Homeless Management Information System (HMIS)

Indiana Housing & Community Development Authority

10/2012

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Homeless Management Information System (HMIS) New User Training Manual

A Homeless Management Information System is an electronic data collection system that stores longitudinal client-level information about persons who access homeless prevention and/or homeless services. HMIS is a valuable resource from the participating homeless assistance and homeless prevention programs in a Continuum of Care (CoC). Aggregate HMIS data can be used to understand the size, characteristics and needs of the homeless population at the local, state and national levels. The HMIS enables information about client needs, goals and service outcomes. To access the HMIS System use the link below, this link can also be accessed through the IHCDA website.

https://ihcdaonline.com

Objectives

→ Review IHCDA Implementation of ClientTrack™ and important changes in data collection

→ Review HMIS Security Policies and Procedures

- Implied Consent Policy

→ Learn to log in and complete the following actions:

- Client Look-up
- Client Entry
- HMIS Program Data Intake Workflow
- Enter Services
- Case Notes

- Complete During Program Enrollment Assessment
- HMIS Program Data Exit Workflow
- Submission of Issues to IHCDA
- Sign Out

→ Review HMIS Contacts for IHCDA

HMIS Staff

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Help Desk

HMIS related issues concerning ClientTrack™ should be submitted to:

HMISHelpDesk@ihcdaonline.com

HMIS Security Policies and Procedures

Personal protected information (PPI) is considered any information that could lead to individual identification. Participating agencies should have procedures in place for the secure storage and disposal of hardcopy and electronic data generated from the HMIS or created for entry into the HMIS. PPI should be stored in locked drawers/file cabinets and hardcopy data should be shredded before disposal. Electronic PPI data including information contained on disks, CD's, jump drives, computer hard drives and/or other media should be reformatted before disposal.

Privacy and Client Information Restrictions

The Notice of Privacy Practices including the purpose for data collection should be posted in a public area and in an office where an intake professional meets with clients. The full Privacy Policy Notice is available on the IHCDA website and should be made available to clients upon request.

A signed client consent form is no longer required. A client who presents to your agency for services and provides information is giving implied consent to enter and share certain data in the HMIS. However, there is some information that will not be shared with other agencies. Information that will not be shared includes HMIS Barriers, domestic violence status and case notes.

Additional information regarding client consent and restrictions will be covered in more detail during training. ***No homeless person is to be refused services regardless of their participation in HMIS.***

HMIS Computers

All computers that are used to access the HMIS should be situated in secure locations. HMIS computers in publicly accessible areas should be staffed at all times and should not be viewable by other individuals. All computers should be password protected and the password you use to log onto your computer should NOT be the same password as your HMIS password, but rather a password to prevent access to the computer itself.

Passwords

HMIS usernames and passwords should NOT be shared with other users. Users should not keep username/password information in a public location (i.e. sticky notes on monitors or filed under ClientTrack™ or Password in a Rolodex). HMIS security policies require the use of strict passwords.

- Must have at least one number
- Must be between 8 and 12 characters
- Must have at least one non-letter, non-numeric character
- Must contain at least one capital letter
- New passwords will be required upon first login
- Accounts are automatically deactivated after 30 days of inactivity

Logging In

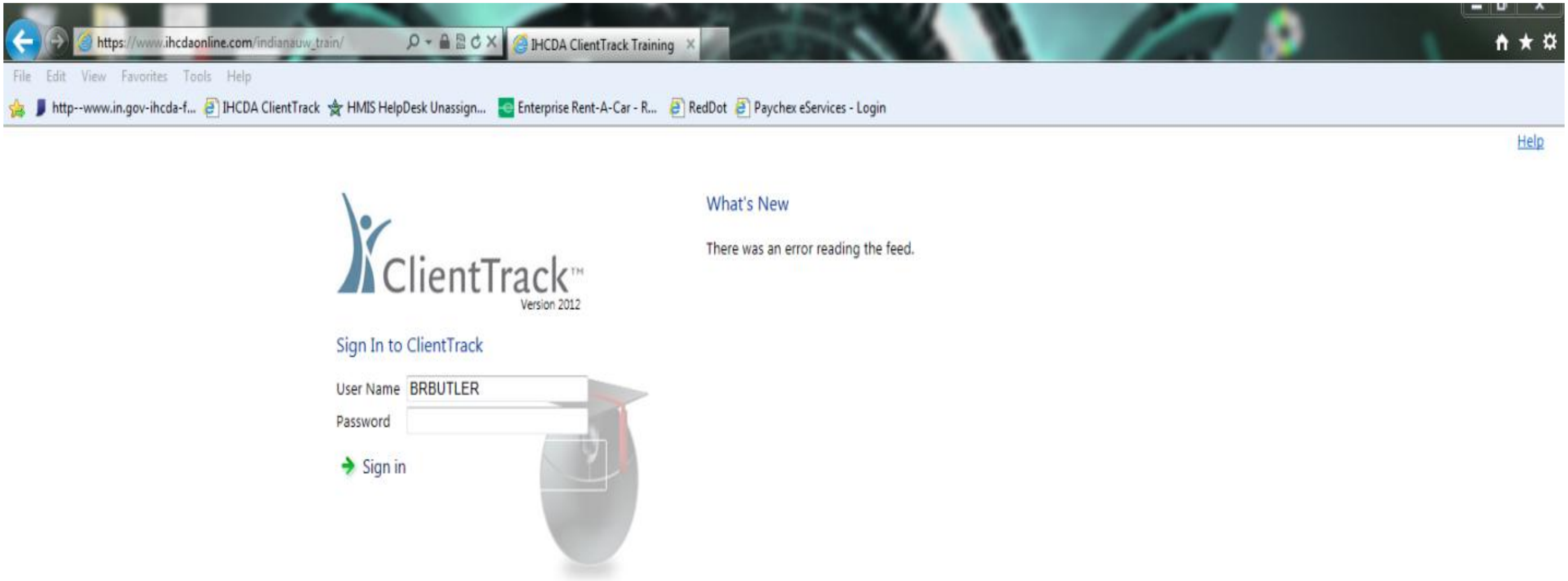
ClientTrack™ is a web-based application. In order to log into ClientTrack™ you will need to use an internet browser. ClientTrack™ will work with Microsoft Internet Explorer, Safari, and Mozilla's Firefox.

User Login

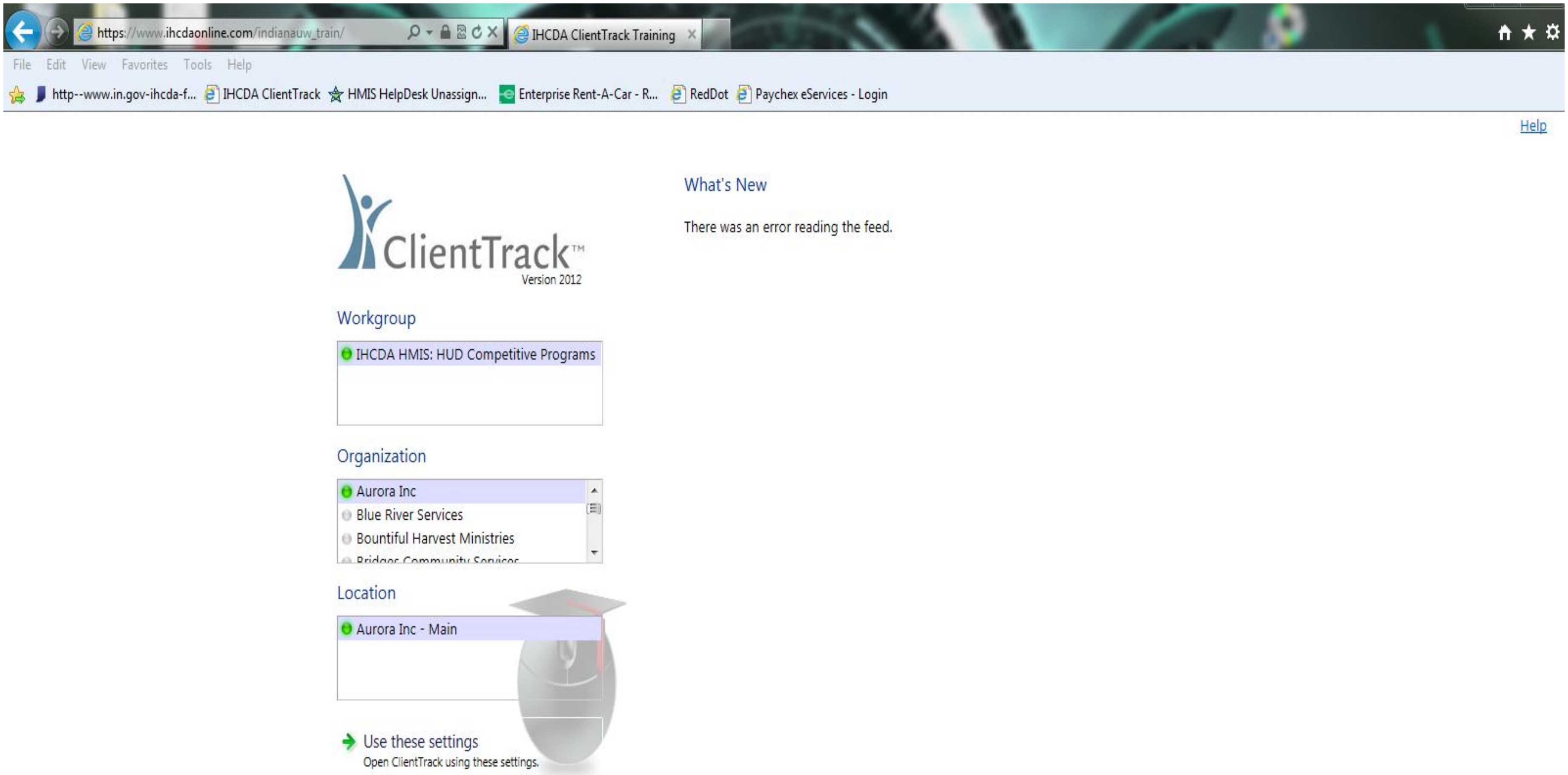
Open your web browser and go to https://ihcdaonline.com . Select the box labeled **"ClientTrack"**.

Enter your assigned User Name and Password and click "**Sign In**". You will be required to reset your password upon your first login. **Remember, sharing your user name and password is not permitted.** **Passwords**

are case sensitive and pop-up blockers must be turned off to access the application. You should change your settings to allow for pop-ups from this site.

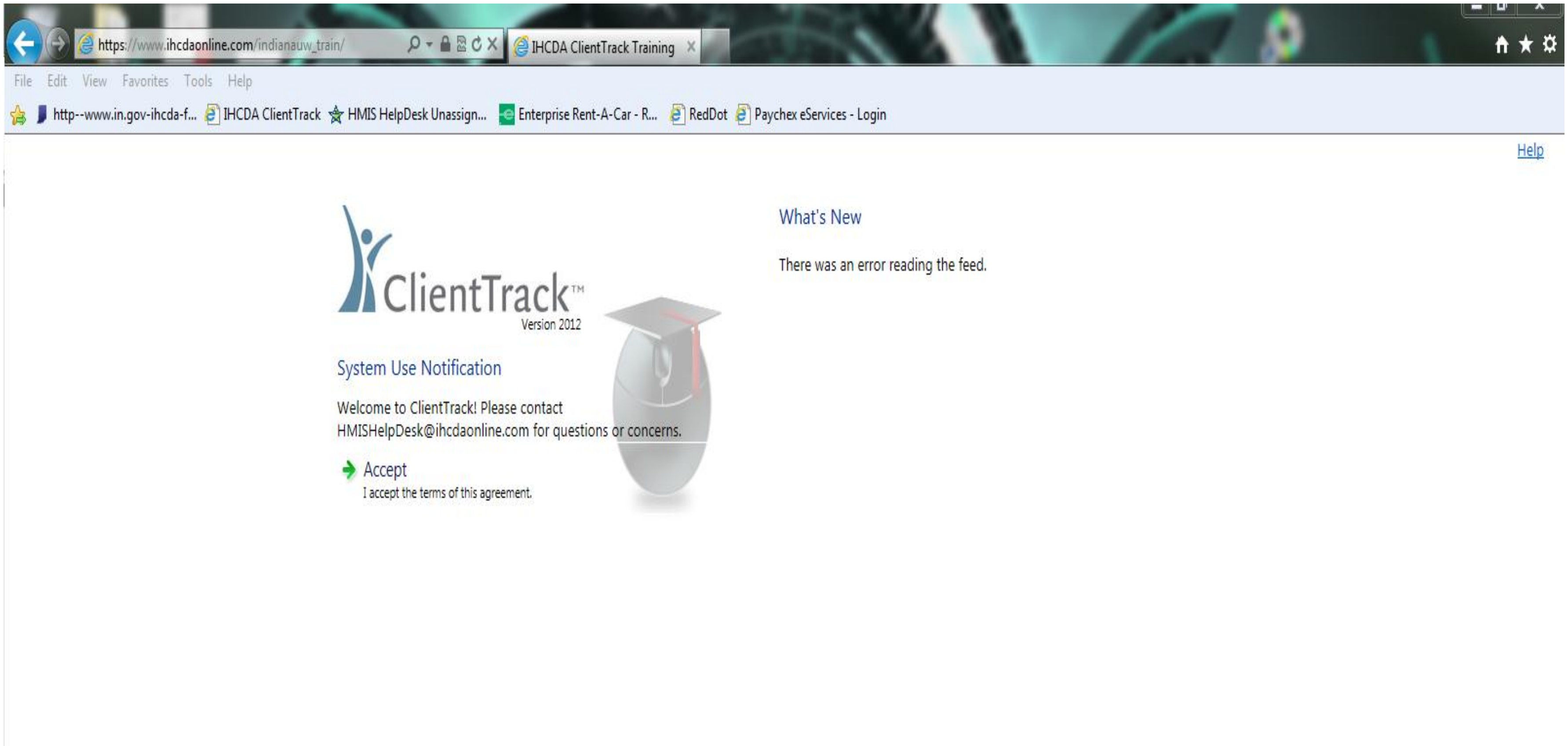


When prompted to select a workgroup, most users will select "**IHCDA HMIS: HUD Competitive Programs User"**. Your organization may participate in other workgroups, so be sure to select the appropriate workgroup. Also, make sure your organization and location is selected appropriately. Click on "**Use These Settings**" to continue.

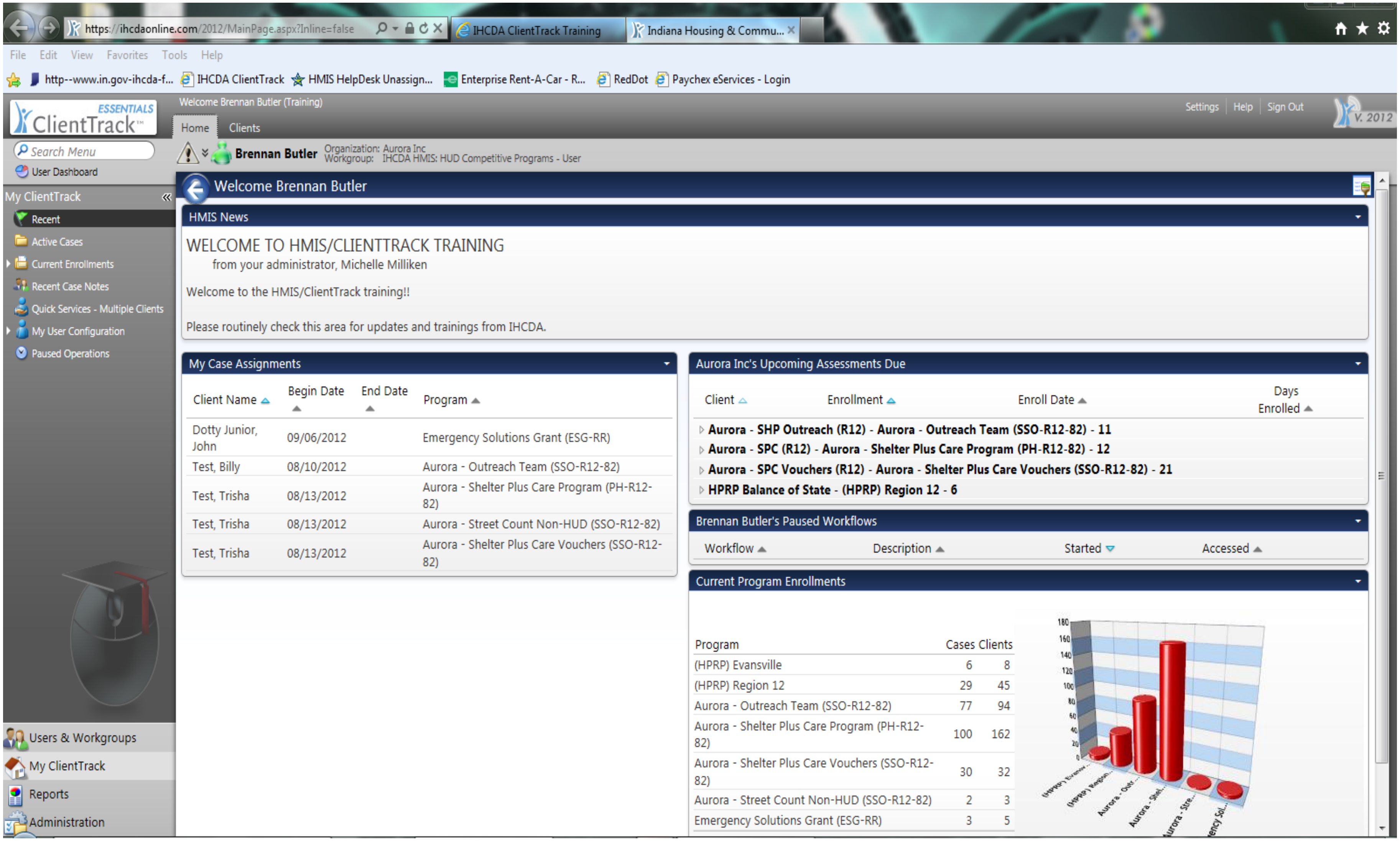


"**Accept**" the Terms of Agreement

*****The HMIS Help Desk email will always be displayed on this page.***



You will be directed to your User Dashboard. You will be notified of any important "HMIS News" items that IHCDA wants to communicate to you; i.e. upcoming trainings, etc. Other features to become familiar with on this screen include Tabs (Home, Clients) and Menu Items (along the left side of the screen). Your Home screen will also give you a list of your case assignments, upcoming assessments due, paused workflows, and current program enrollments.



*****The first time you log into ClientTrack, you will need to follow these instructions in order to get the Menu items along the left side of the screen to appear.***

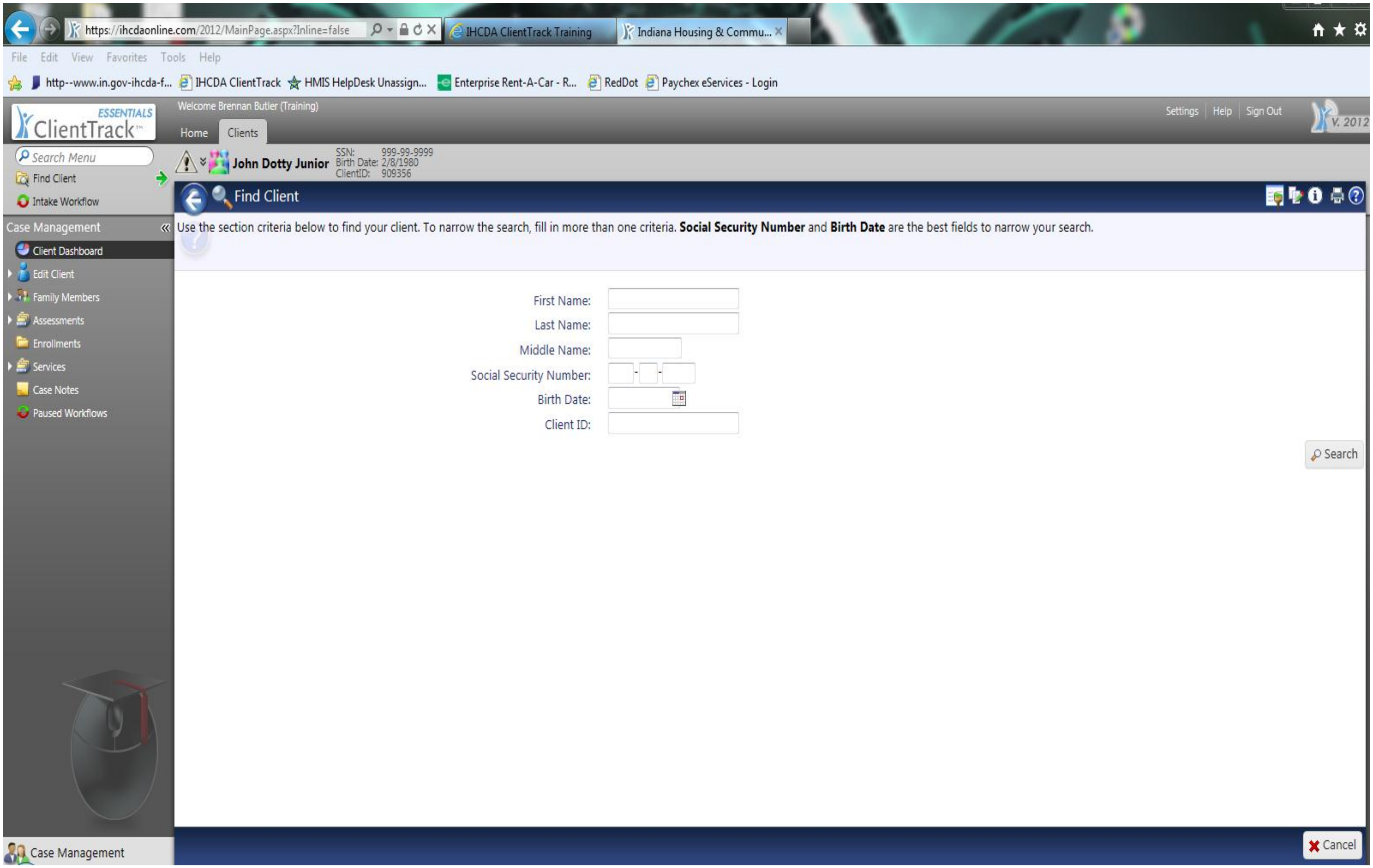
Client Look-Up

Click on the "**Client Tab**" at the top of screen. Select "**Find Client**" from the menu items along the left of the screen. Enter the name of a client that is currently enrolled in your program. Click "**Search**" in the bottom right hand corner. Select the client from the list that is displayed. Once the client dashboard is visible, click the "**Case Management**" item on the bottom left hand corner of the screen. All Menu items on the left of the screen should now be visible.

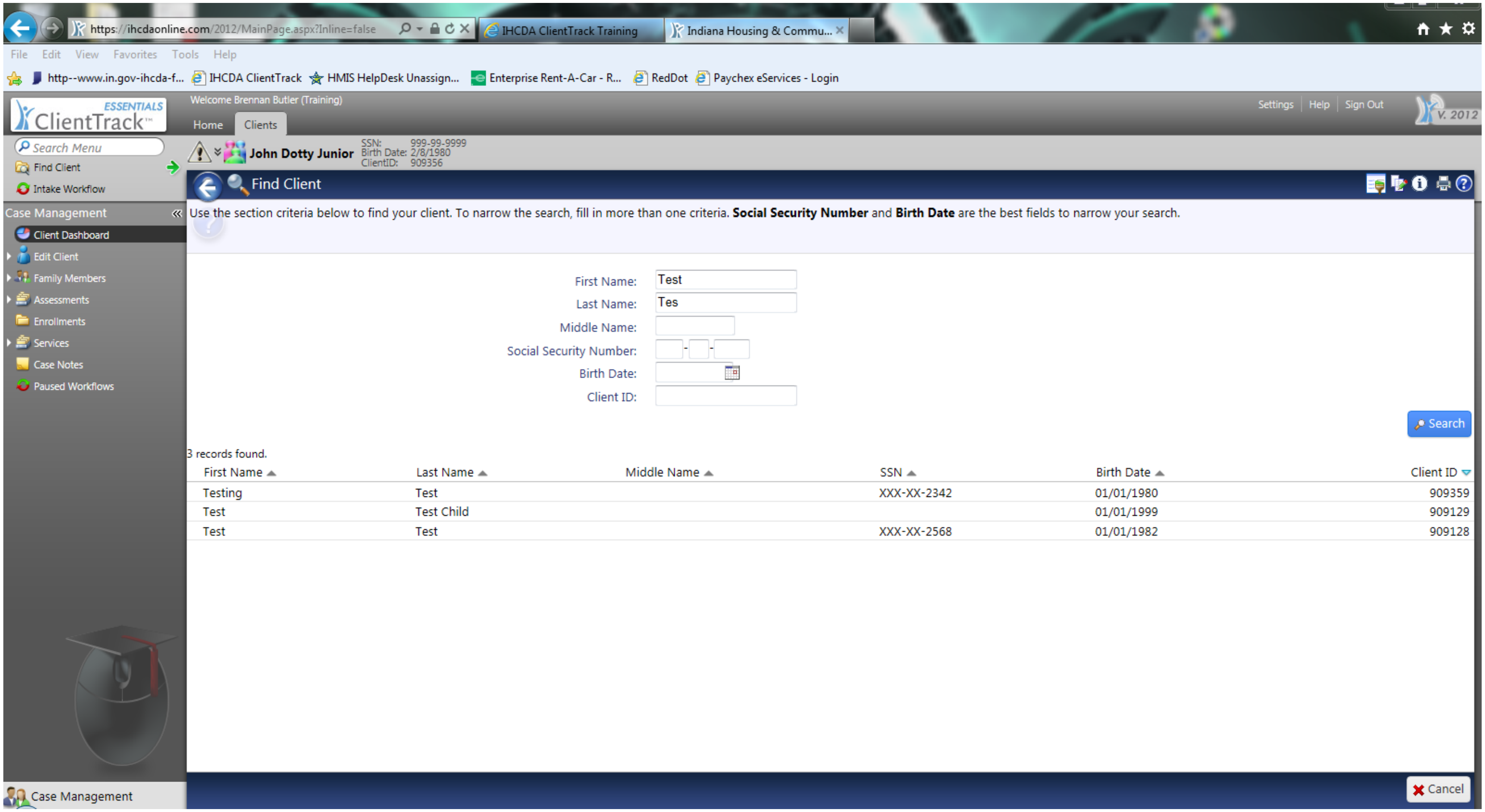
It is imperative you do not enter a duplicate client record into the system in order to ensure the accuracy and overall quality of the HMIS data. Even though ClientTrack™ will warn you of potential duplicates, it is important to search for clients and other household members prior to the start of adding a new client. To search for an existing client in the database, click the "**Find Client**" menu item on the Client tab.

Tech Note

To speed the search process and reduce the chance for input error, input as few characters as possible in the criteria fields. Also, you can use the wildcard character %. For example, J% would filter the results by any string beginning with J. Another example is %on. This would filter by any string containing 'on'.


https://ihcdaonline.com/2012/MainPage.aspx?Inline=false
IHCDA ClientTrack Training
Indiana Housing & Commu...
File Edit View Favorites Tools Help
http--www.in.gov-ihcda-f... IHCDA ClientTrack HMIS HelpDesk Unassign... Enterprise Rent-A-Car - R... RedDot Paychex eServices - Login
ESSENTIALS ClientTrack
Welcome Brennan Butler (Training)
Home Clients
Settings Help Sign Out
V. 2012
Search Menu
Find Client
Intake Workflow
John Dotty Junior
SSN: 999-99-9999
Birth Date: 2/8/1980
ClientID: 909356
Find Client
Case Management
Client Dashboard
Edit Client
Family Members
Assessments
Enrollments
Services
Case Notes
Paused Workflows
Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search.
First Name:
Last Name:
Middle Name:
Social Security Number:
Birth Date:
Client ID:
Search
Case Management
Cancel

You may search for a client by entering letters of the client first/last name, social security number or birth date. It is important to try different options for your search. It is best to **only** enter the first few letters of the first/last name and not rely solely on a social security number or birth date, as those elements have a higher rate of missing or inaccurate data. Another search hint is to search different spellings and remember to search for nicknames such as “Bob” in addition to “Robert” or “Bill” in addition to “William”.



If the client is already in the system, highlight the client name in the search results and click "**Client Name**" to select. The selected client's information will be displayed at the top of the screen. All information entered from this point forward while on the Client Tab will be associated with the currently selected client. You should click on the "**Edit Client Information**" menu item and make any necessary changes to the client demographic information.

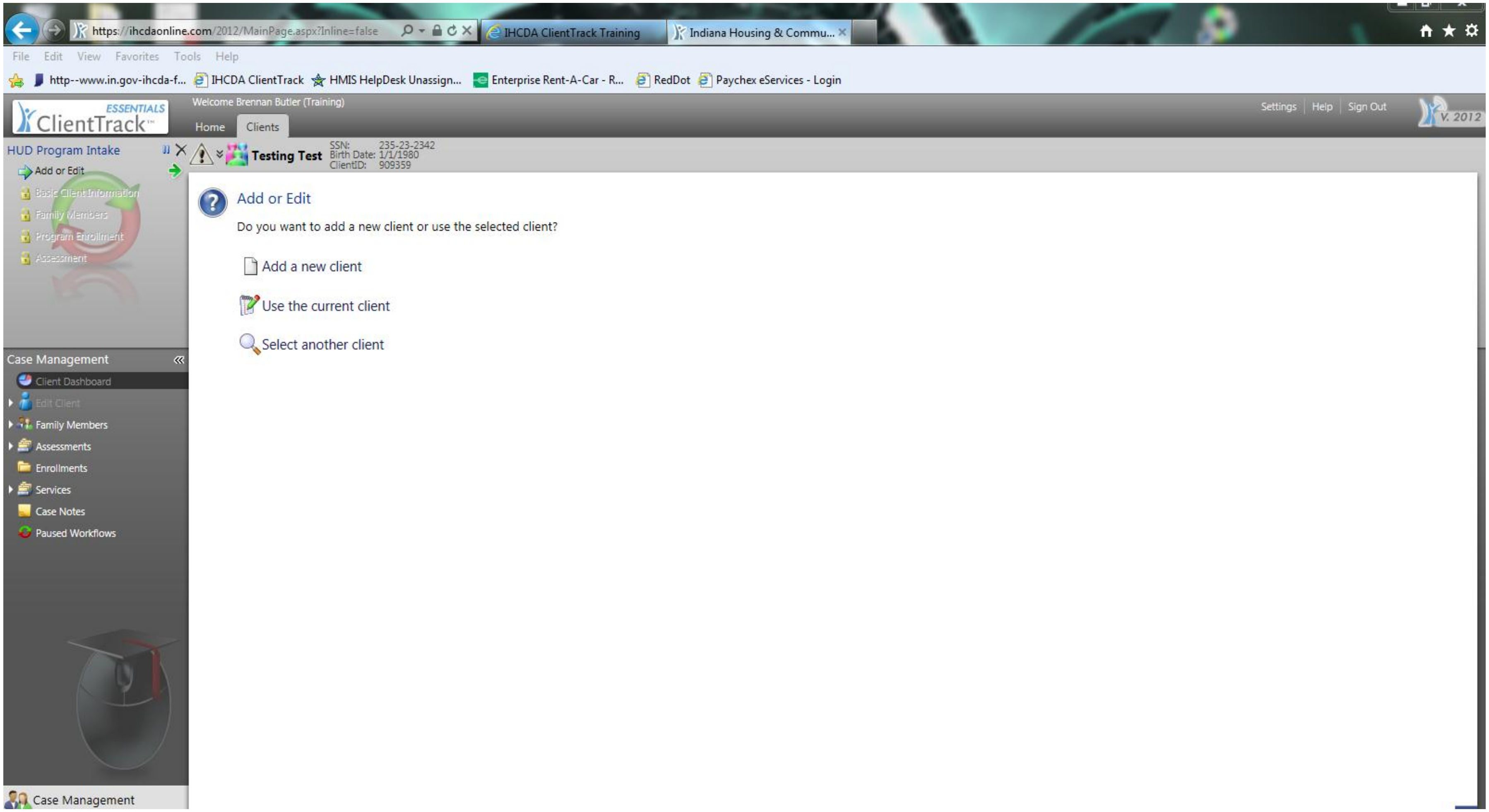
*****Please remember, the "Save" button will save the changes you made to the screen and leave you on the same page. The "Save & Close" button will save the changes you have made to the screen and move you to the next one.***

Add a New Client

In order to ensure all required assessments are completed, ClientTrack™ utilizes a specific workflow that steps you through this process. Using these built-in workflows, you will step through these processes automatically. Click the "**Workflow**" option that is appropriate. **Be sure you begin the workflow while you are on the client record for the Head of Household.** You will be asked to verify the intake information for the client. Make any changes if necessary and click "**Save**". If there are no changes, click "**No Changes**".

The steps for the workflow will be displayed in the upper left hand corner of the screen. The first step is the completion of the Master Assessment. On the Master Assessment screen, be sure to change the Assessment Date if different from today's date.

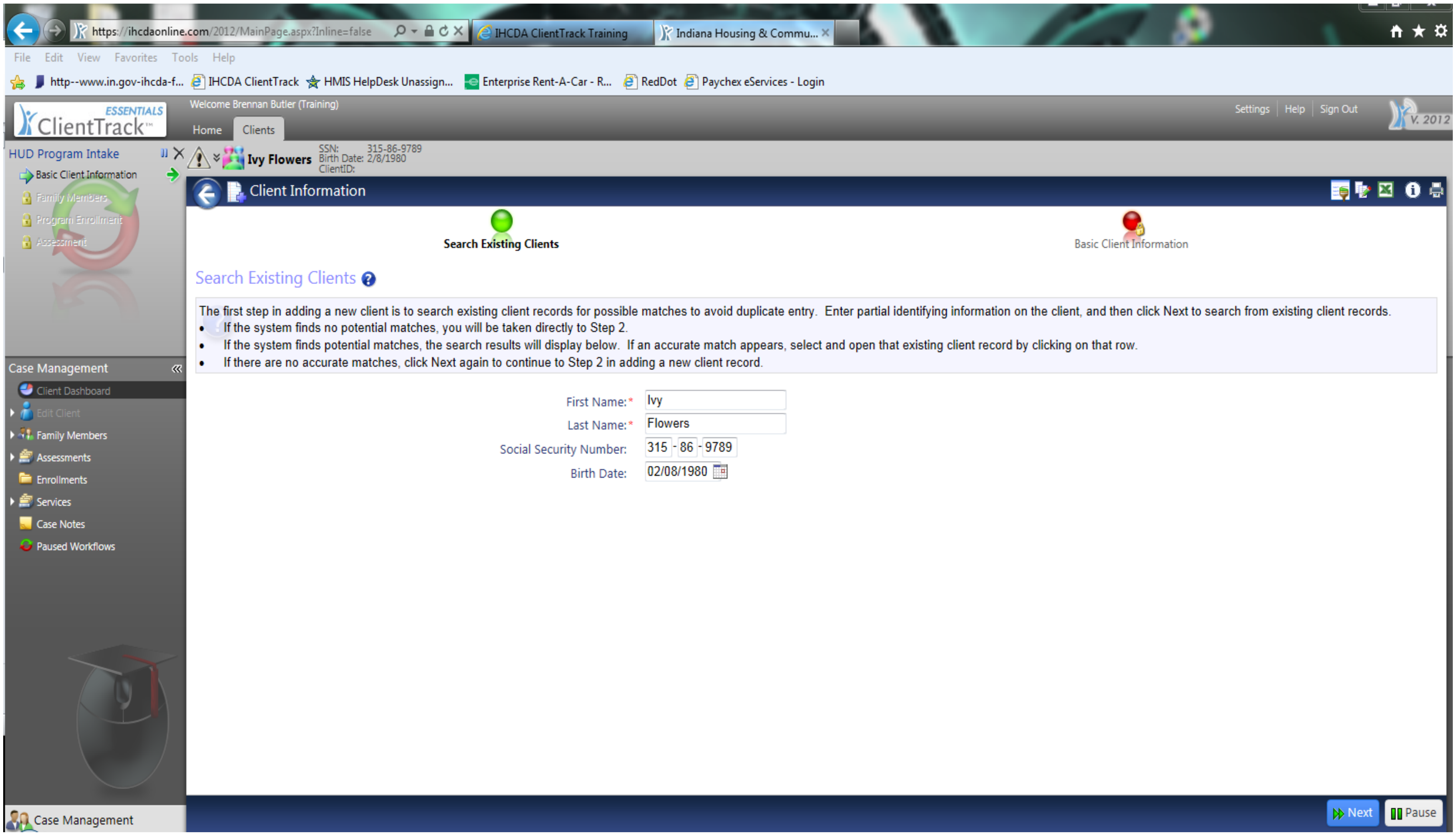
To add a **NEW** client to the database, select the "**Intake Workflow**" menu item to the left. Choose the appropriate button "**Add a New Client**". If a duplicate client already exists (and was not identified during the client lookup), a warning in red letters will be displayed. It is very important to review the displayed list. If the client is already in the system, click the client's name to select. If the client you are entering is in fact a new client (do NOT select a client in the displayed list), click "**Next**" to proceed with the intake process.



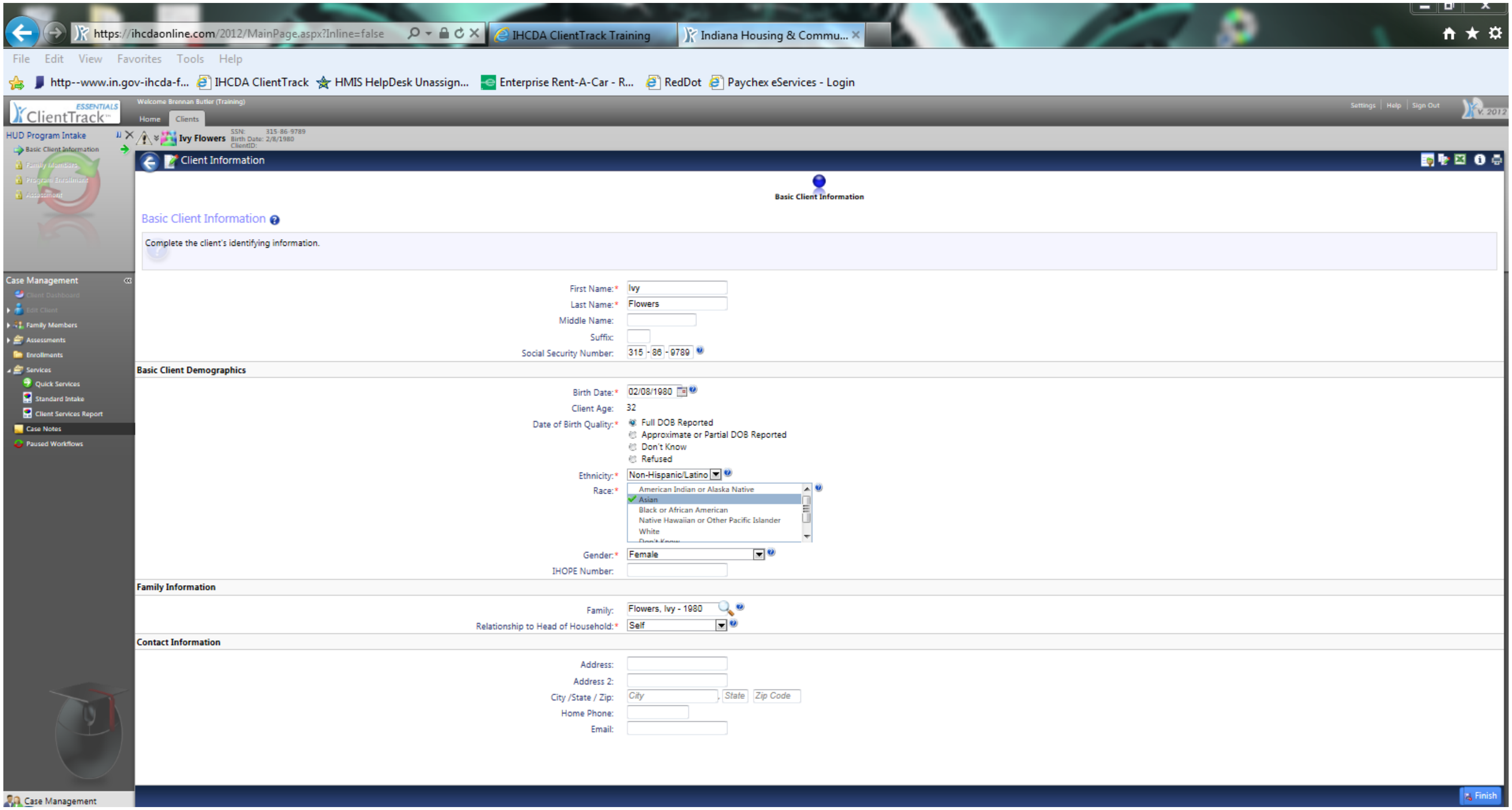
IHCDA is always working to eliminate duplicate clients in the HMIS. Please contact the IHCDA HMIS Help Desk at HMISHelpdesk@ihcdaonline.com with clients that have multiple records in the system. When sending a notification of duplicates or any information regarding clients to the HMIS Help Desk please DO NOT include a full social security number. Client ID numbers can be found to the left of the client name on the client lookup screen or above the client name on the client dashboard.

The Workflow

To search for a client in the system, type the first few letters of the first name and last name, and then click on the "**Next**" button on the bottom of the screen. (This will automatically search for client a second time.)



Once you have searched for the client and click "**Next**", you will be prompted to enter demographic information for the client. Items with a red asterisk * are required fields and records cannot be saved without entering this data. Birthdate and Phone Number fields are auto-formatted so that dashes are not required when entering information in these fields. Birthdates can be entered in mmddyyyy format. Once entered, they will be automatically formatted to the appropriate display. Click on the "**Next**" button when finished.



First Name – Legal first name (do not add nicknames in "quotes" – those are not searchable elements, add this information to the alias field)

Last Name – Legal Last Name

Social Security Number – If the client does not know or refuses to provide their SSN, ***<u>DO NOT</u>*** **under any circumstance**, **enter a fake social security number such as 123-45-6789 or 999-99-9999**. Select the data quality option that best fits the situation.

Birth Date – Month, day and year the client was born. Again, do not use a fake number. Choose the appropriate data quality option that best fits the situation

Ethnicity – Determines if a client is of Hispanic/Latino origin and includes individuals of Cuban, Mexican, Puerto Rican, South or Central American origin

Race– This is a self-identified data element and a person can identify with multiple races. This is a multi-select box that allows for multiple races to be checked

Gender – Select gender with which client identifies

IHOPE Number – This is an optional field

Household – Do NOT enter anything in the Household field. ClientTrack™ will create a household/household account

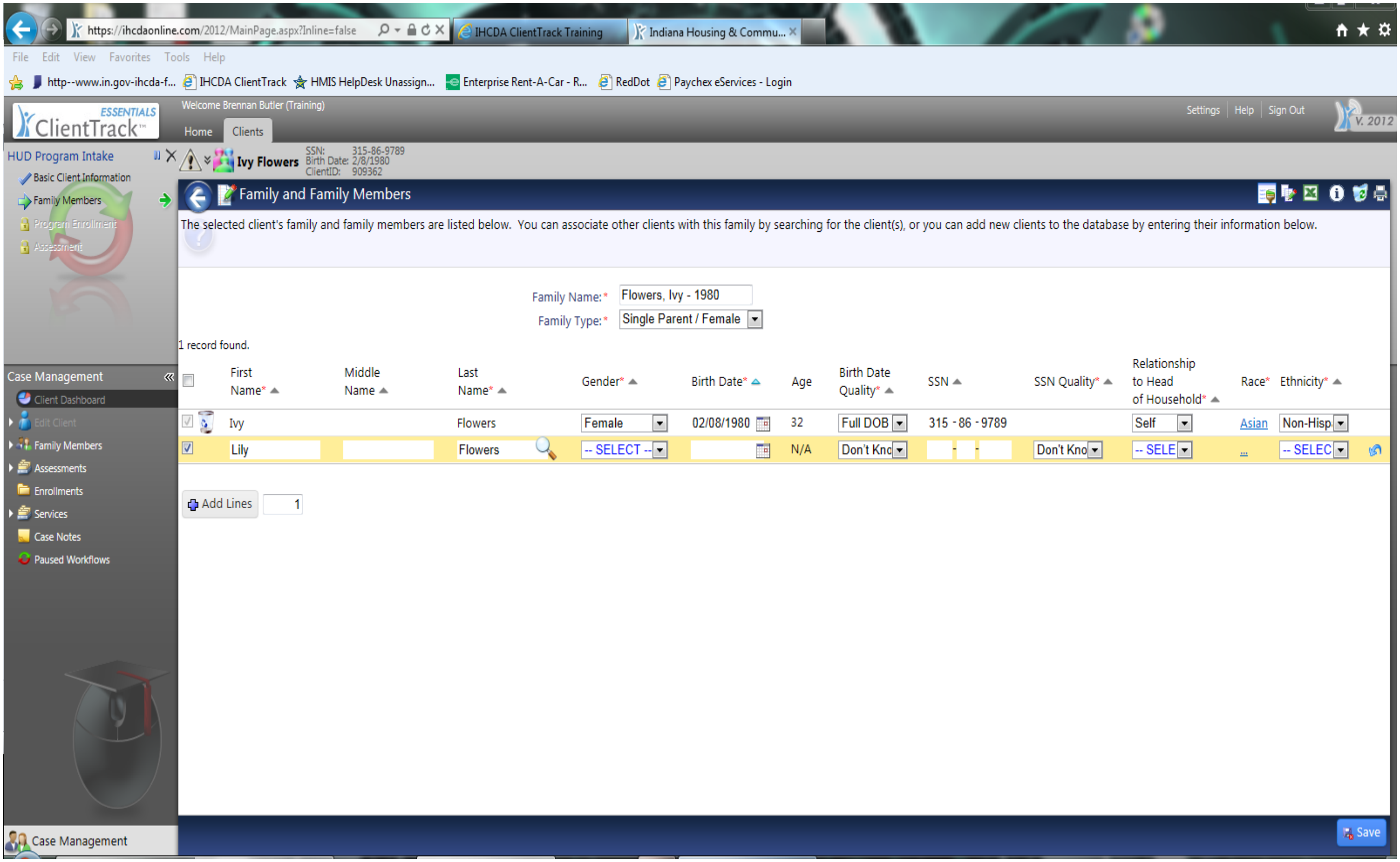
Relationship to Head of Household – When entering the first client in the household, the system will default to "Self". It is imperative this information is entered correctly for ALL household members. Otherwise, your reports will not accurately reflect the clients and household make-up

Address – Add the address where client will be residing (emergency shelter, etc.). This is NOT the previous address of the client

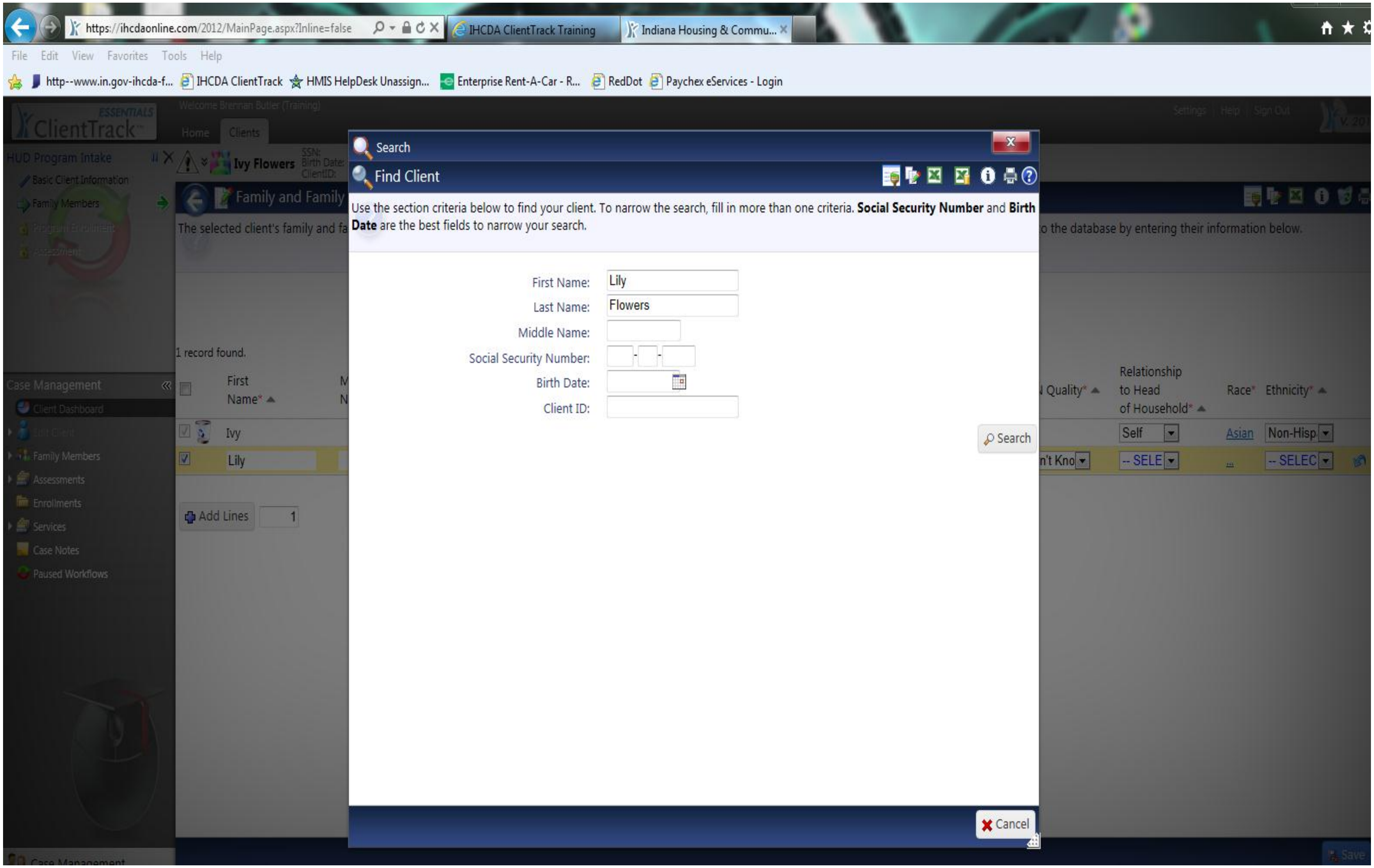
Click on the "**Finish**" button when completed.

Add Household Members

Next, you will be prompted to add any additional household members.



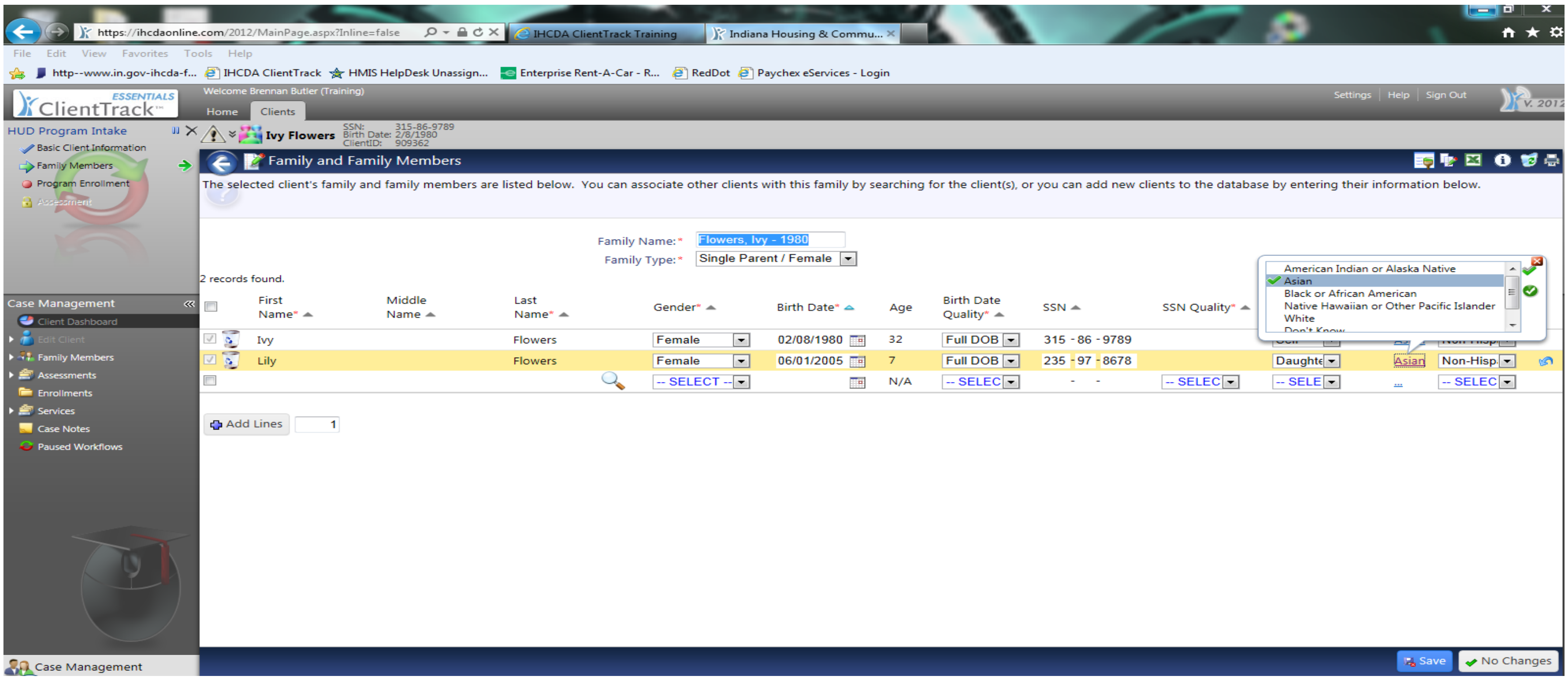
Select the **"Household Type"**. Click on the "**Empty Box**" and a check mark will appear. Enter the name of the next household member, the system will complete a search for that client name.



If the client is found, select the client from the list and edit as necessary. Select "**Cancel**" if the client is not found in the system.

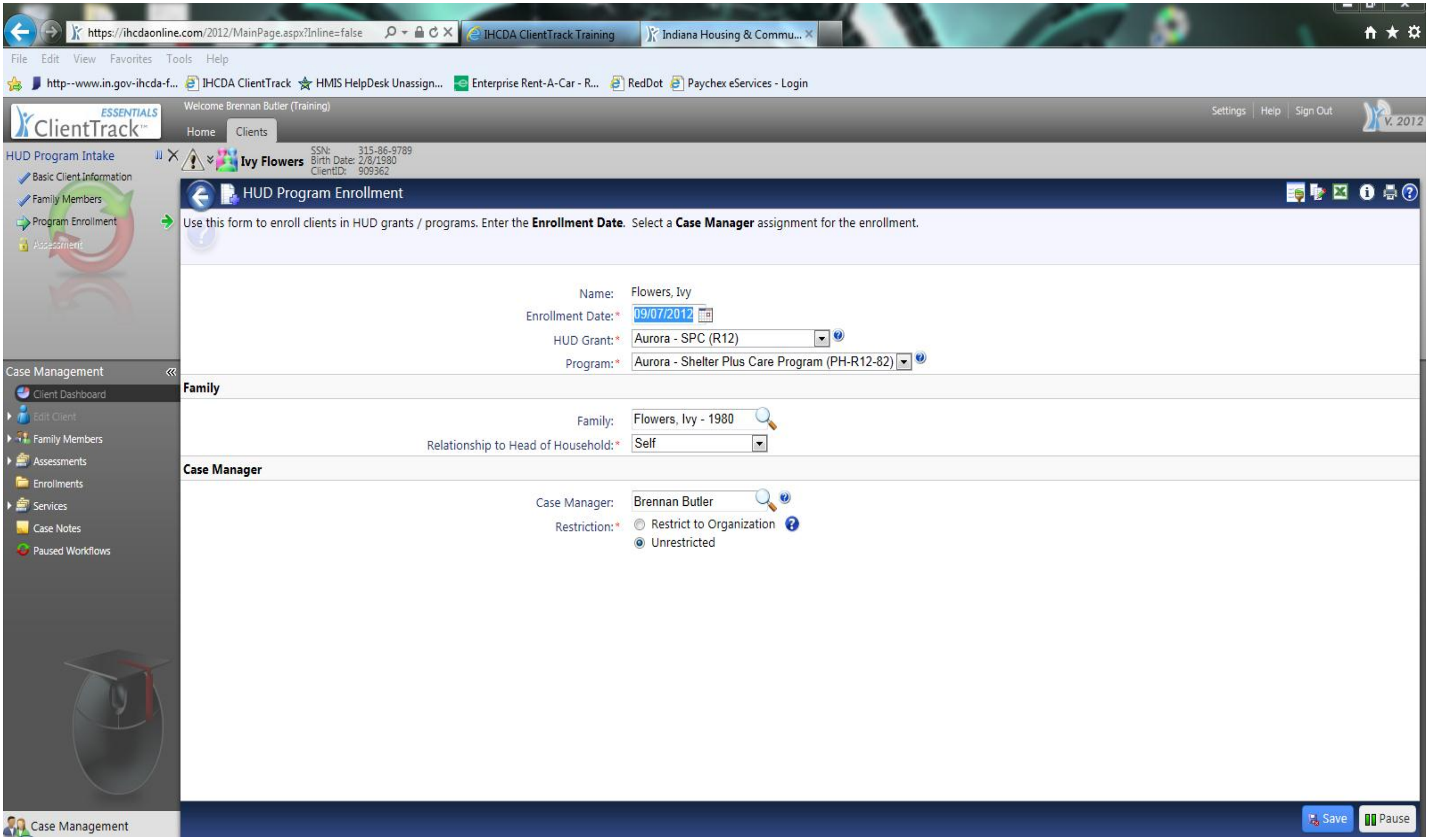
Please be sure to complete all information requested. For the race category, you must click on the blue line with the three blue dots to access the race categories. Be sure to select a race and then click on the "**Green Circle"** with the check mark. Be careful that you do not use the select all icon. Add lines for additional household members as necessary by clicking on the **"Add Lines"** box.

Click the "**Save**" button when all household members have been added. You will receive an error message if you are missing any required data fields. If you receive this error message, review the information and input any missing data.

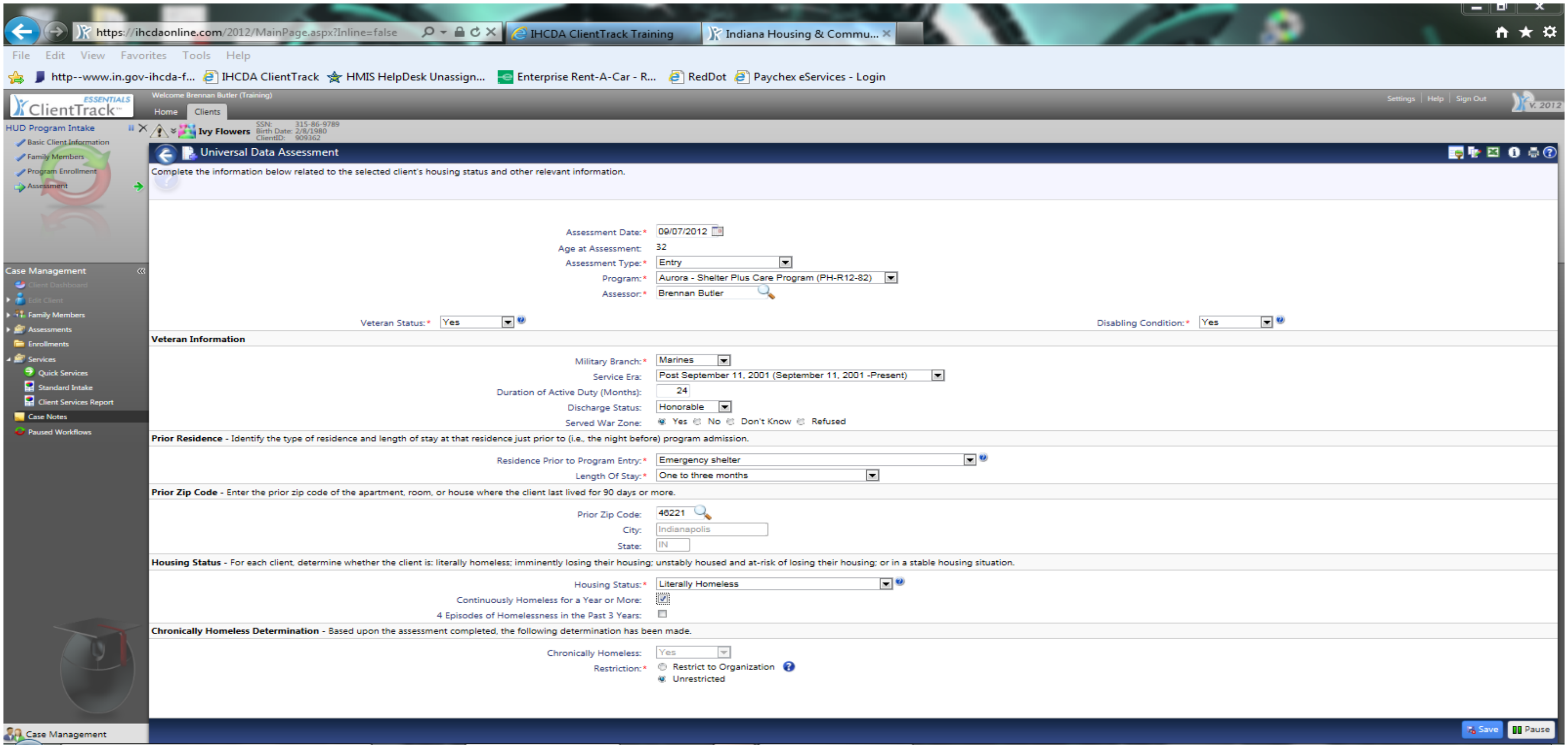


You will then be prompted to create the enrollment.

****Remember to change the Enrollment Date if you are back dating the information. To ensure accurate data quality enter all client data in a timely manner.***

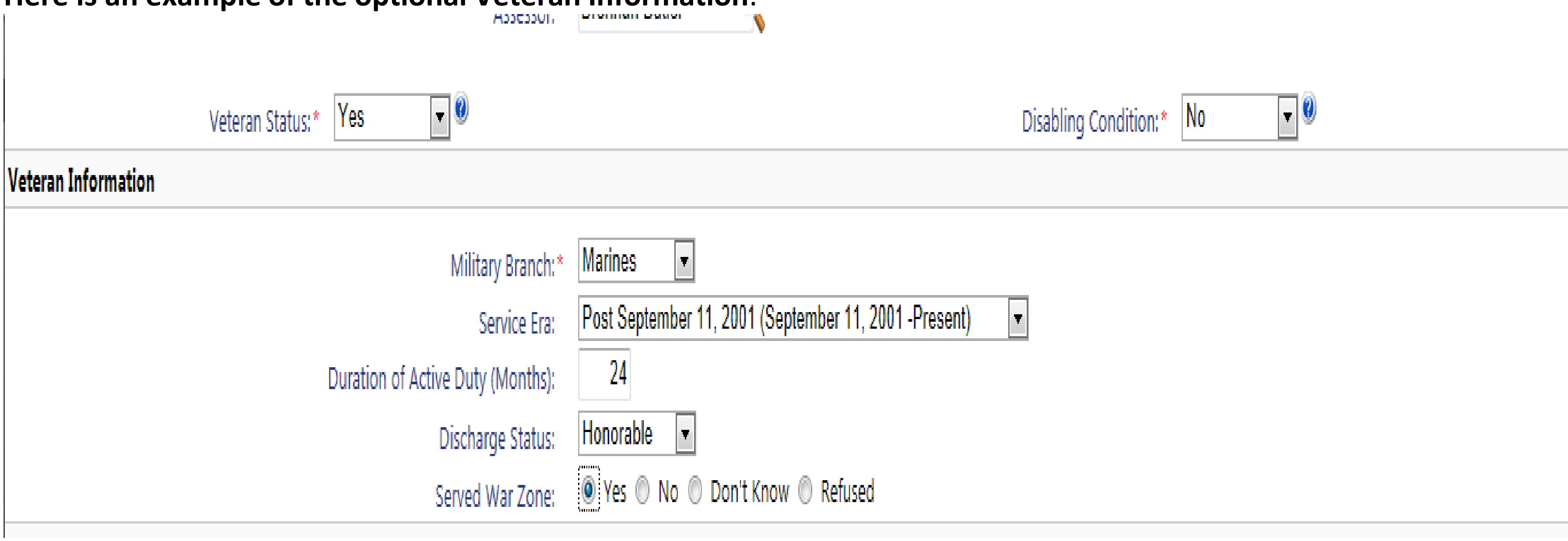


You will be required to choose the HUD Grant and Program and click “**Next**”. *If you do not find your specific grant and/or program, cancel the workflow by click the “**X**” and please notify IHCDA immediately at HMISHelpDesk@ihcdaonline.com . Please include the name of your grant and program along with specific contact information so that the issue can be resolved as soon as possible. Grant and program information must be set up in the system before you can begin to enroll clients.* Click the “**Save**” button when completed.



You will now begin a series of required assessments that will finalize the household enrollment. Make sure to properly check" **Yes or No**" for the Veteran Status and Disabling Condition. Certain logic is built into the system that will provide for additional drop down menu options based on the way in which certain client data is entered. Because this client is a veteran, additional questions are required to be answered.

Here is an example of the optional Veteran Information:



Assessment Date – Date the assessment was completed with the client (field will auto-fill with today's date)

Residence Prior to Program Entry – Identify where the client was staying on **the night before** the client is enrolled in your program

Length of Stay – Identify the length of stay for the residence prior to program entry

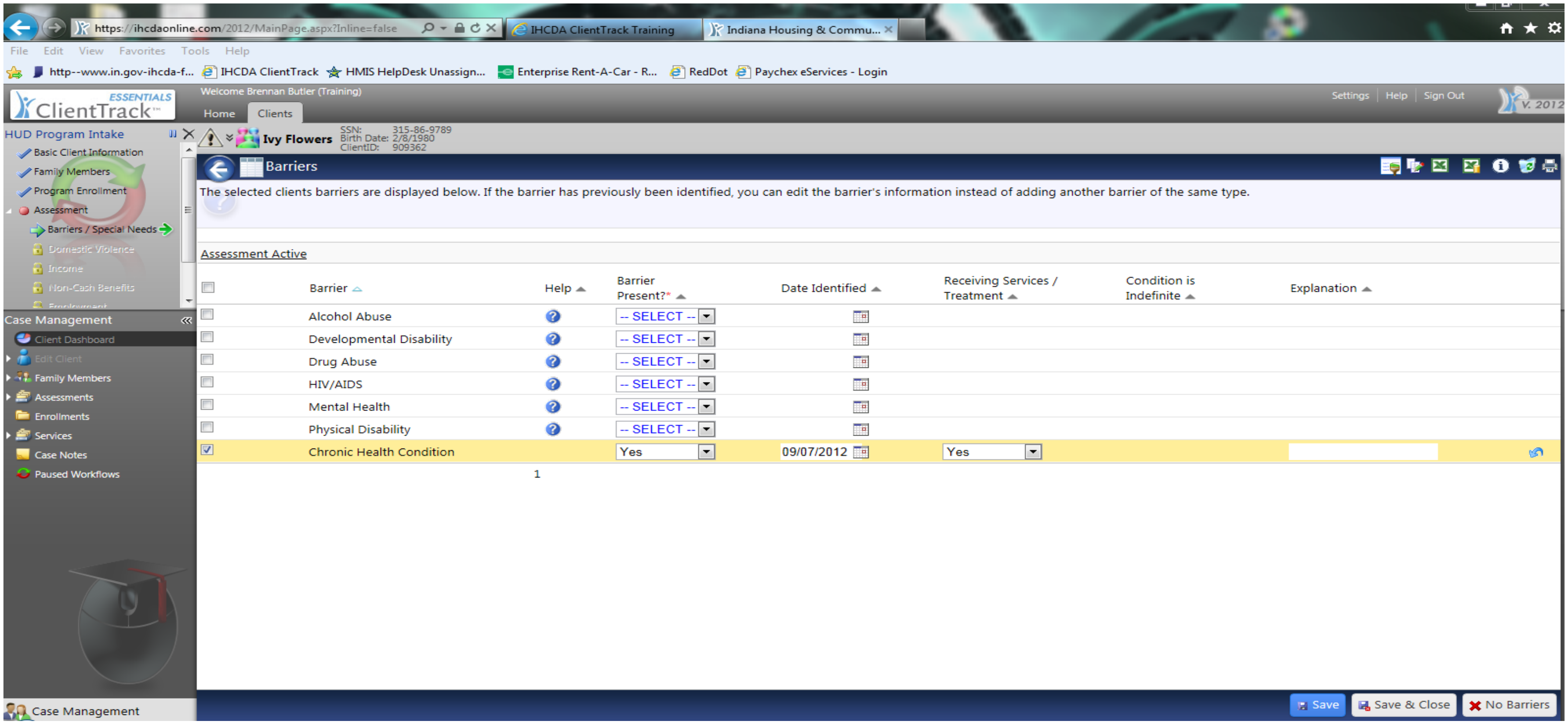
Prior Zip Code – Remember this is the *zip code of the client's last permanent residence of 90 days or more*. The system allows you to look up the zip code if the client knows the city, but not the specific zip code.

Click on the look up icon and type in the city and state and a list of potential matches will be displayed. Choose one of the zip codes from list provided

Housing Status – Choose the appropriate category for the housing status of the household. More extensive definitions can be found by clicking the blue information circle next to the drop down box

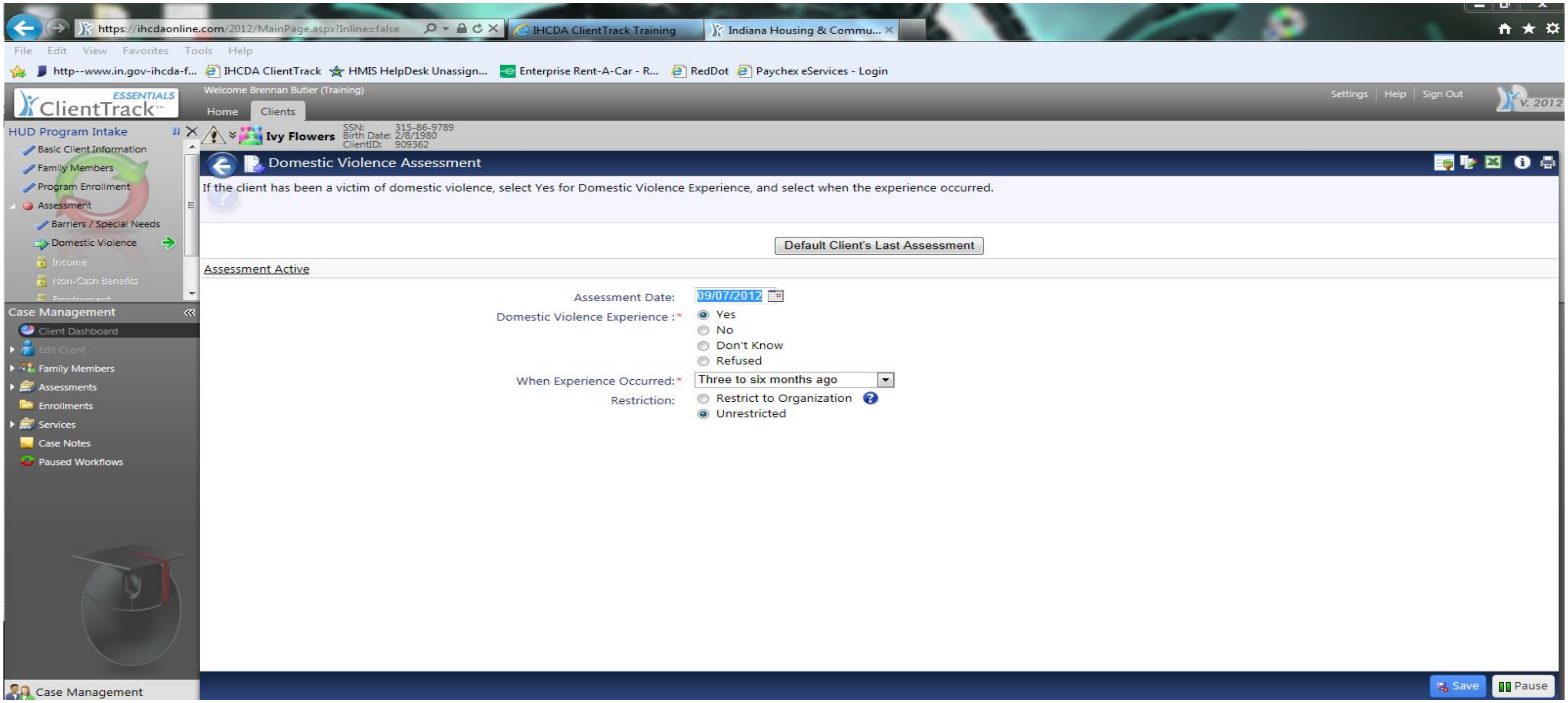
HMIS Barriers Assessment

The built in logic may create additional fields that are required. All fields with a red * are required. If the client has no barriers, click on the No Barriers button in the lower right hand corner. Only select yes if barrier is present. It is important to keep in mind clients must have at least one barrier to be eligible for some programs (such as Shelter + Care). Click "**Save & Close**" when completed.



Domestic Violence Assessment

Note that if you say “Yes” an additional field named “When Experience Occurred” will be required. Click “**Save**” when completed.



Financial Assessment Cash Benefits

An Income Assessment will be completed for EACH household member. You must answer the question of income received and non-cash benefits. ***Note:*** *Income received by a household member such as child support, TANF, WIC and food stamps should be designated on the assessment of the household member who directly receives payment.* If an adult receives a SSI or SSDI benefit on behalf of a child, that income should be designated on the income assessment of the child. It is very important that income (cash or non-cash) is properly designated on the proper client assessment.

Earned Income – Employment income

Other Income – Any income not previously listed

Unemployment Insurance – Unemployment benefits from the State

Private Disability Insurance – Non-government funded disability payments

Worker's Compensation – Income for individual who has been injured on the job

Self-Employment – Income earned by an individual who works for themselves

Supplemental Security Income – A federal program that provides additional income for older and disabled people with little to no income stream

Veteran's Disability Payment – Disability payment provided by the Department of Veteran's Affairs

Social Security Disability Income – A monthly compensation to individuals who can no longer work due to their medical conditions

Retirement (Social Security) – Income payment provided by government for individuals that qualify

Other Pension – Cash payment made from a private employer

Veteran's Pension – Cash payment made by the Department of Veteran's Affairs

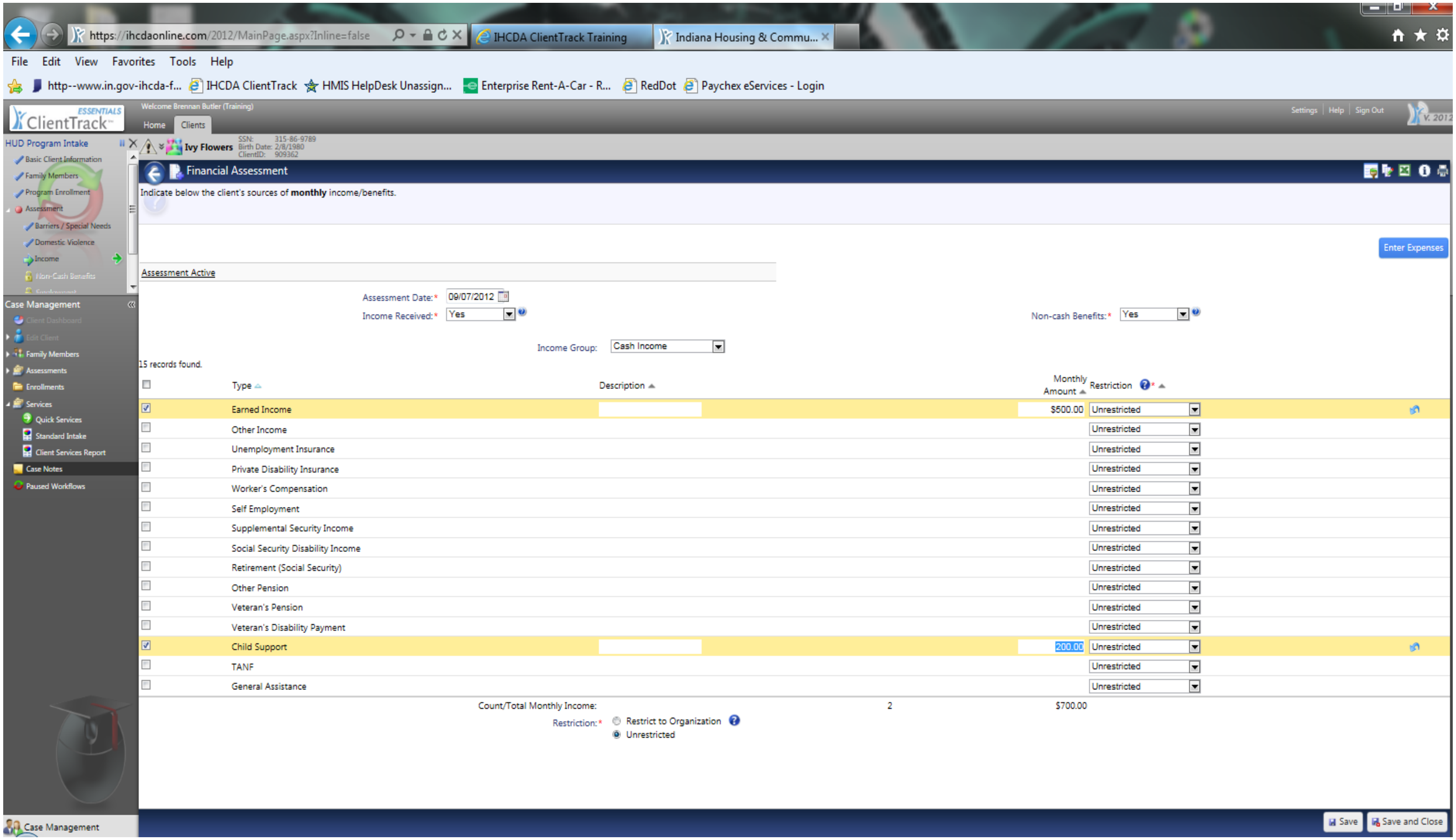
Veteran's Disability Payment – A benefit paid to a veteran because of injuries or diseases that happened while on active duty, or were made worse by active duty

Child Support – Income received from one parent to another to care for children

TANF –Temporary Assistance for Needy Families

General Assistance – Cash from household or friends, trustee or church/non-profit

Click "**Save and Close**" when completed.



Financial Assessment Non-Cash Benefits

This assessment is specific to individual – not the household in general. An assessment for non-cash benefits will be completed for each household member.

Food Stamps/Money for Food on Benefits Card – Monthly payments provided to individual in advance in a tax refund, Food Stamps (Snaps) – A stamp or coupon, issued by the government to persons with low incomes that can be redeemed for food at stores

MEDICAID – A joint federal and state program that helps low-income individuals or families pay for the costs associated with long-term medical and custodial care provided they qualify. Although largely funded by the federal government, Medicaid is run by the state where coverage may vary

MEDICARE – A federal program that pays for certain health care expenses for people aged 65 or older

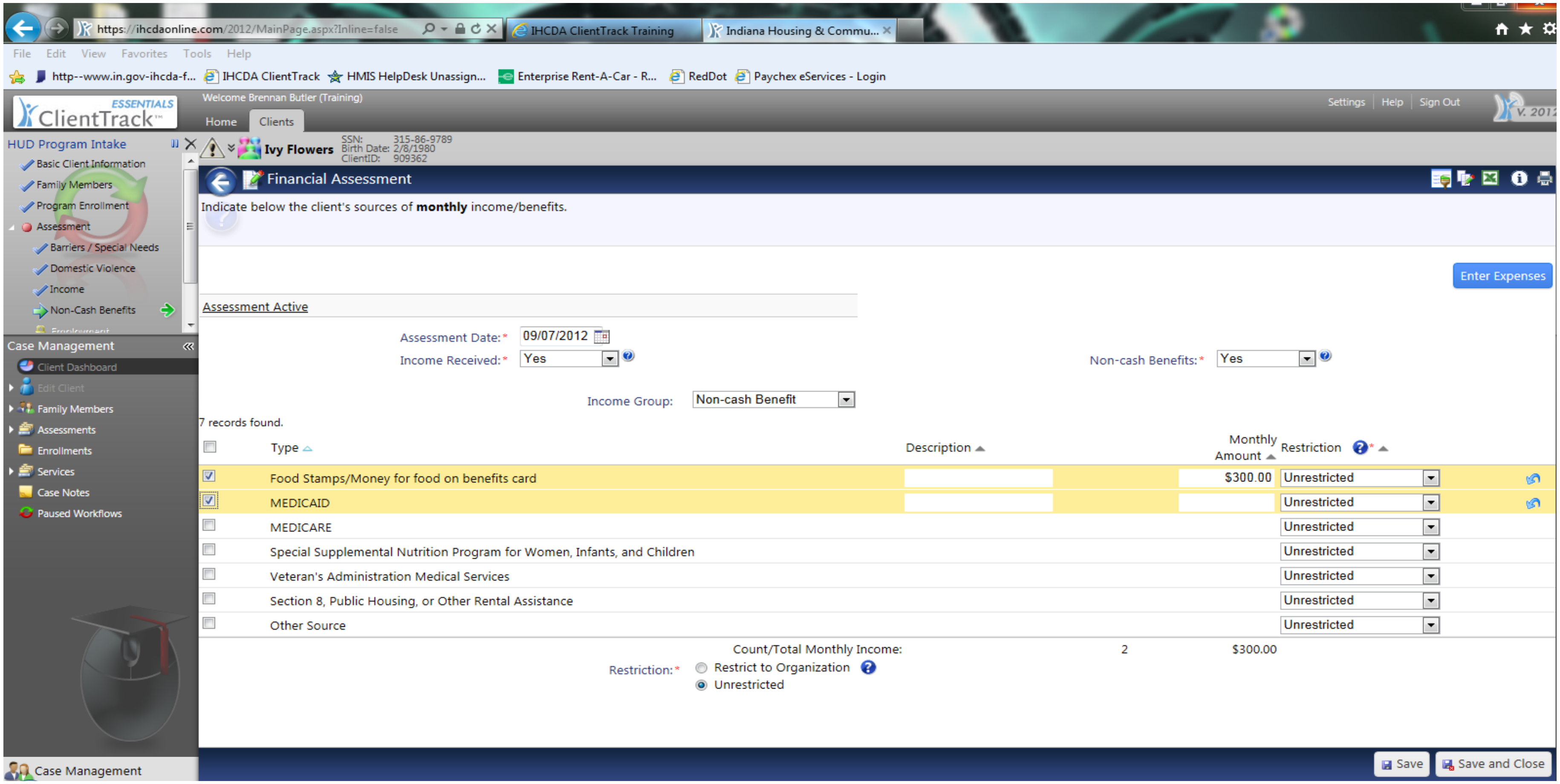
Special Supplemental Nutrition Program for Women, Infants and Children (WIC) – A program geared toward supplying nutritional food for at risk pregnant women and their families.

Veteran's Administration Medical Services - Health care benefits and services provided for Veterans

Section 8, Public Housing or Other Rental Assistance – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development

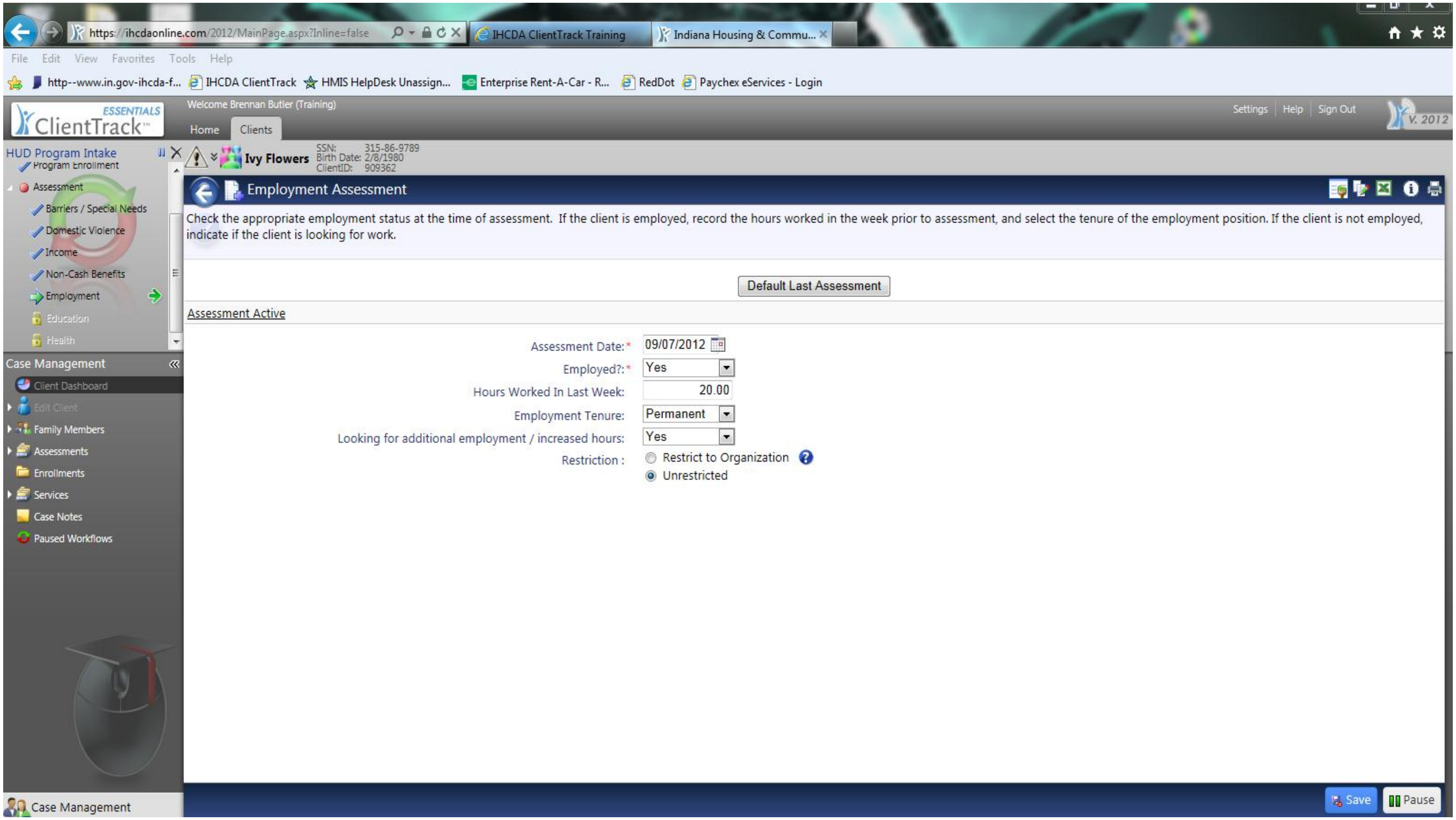
Other Source – Any source not previously listed above.

Click "**Save and Close**" when completed.



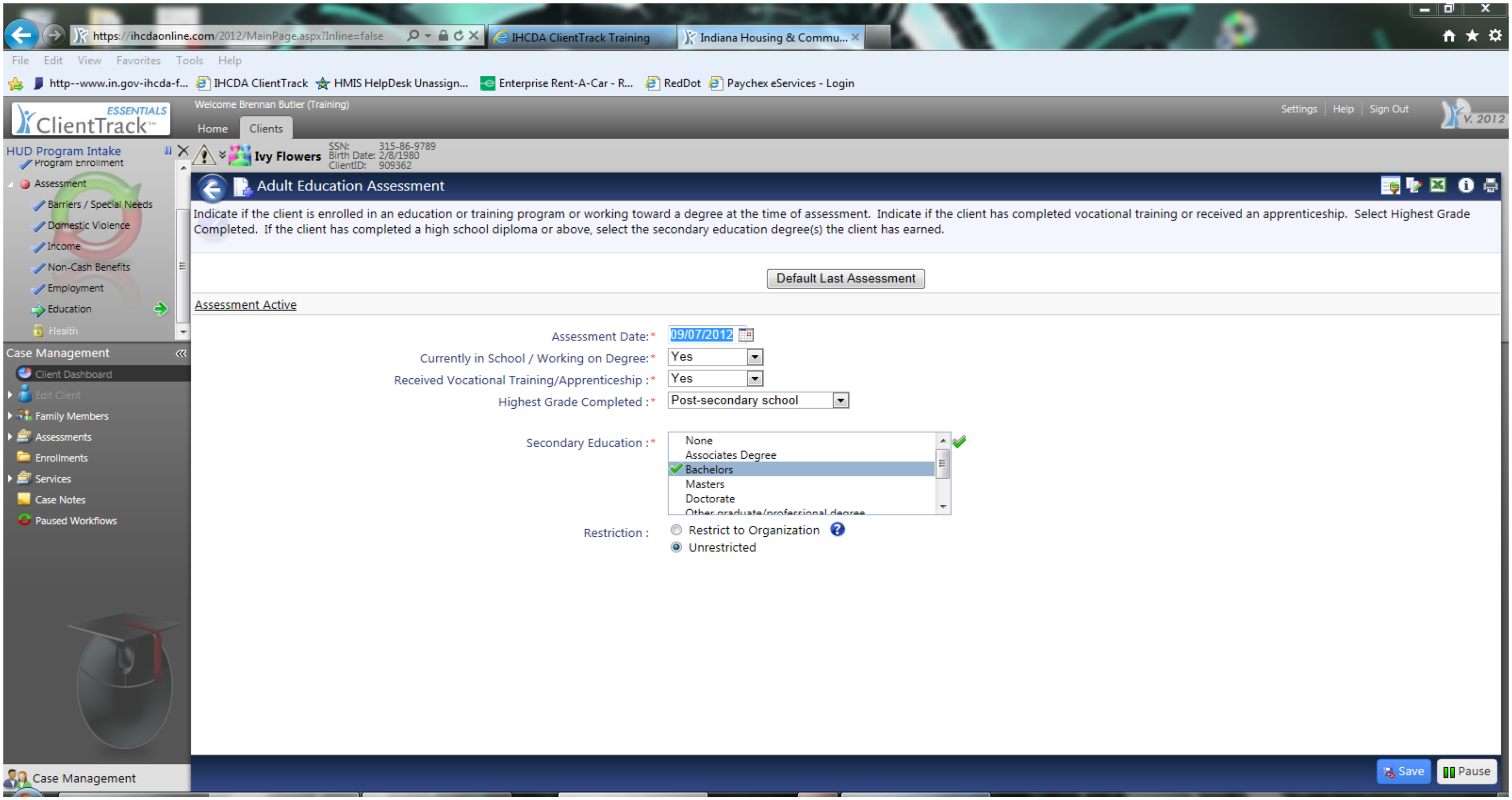
Employment Assessment

When filling out the Employment Assessment keep in mind the built in logic may require you to fill out additional information. Click “**Save**” when completed.



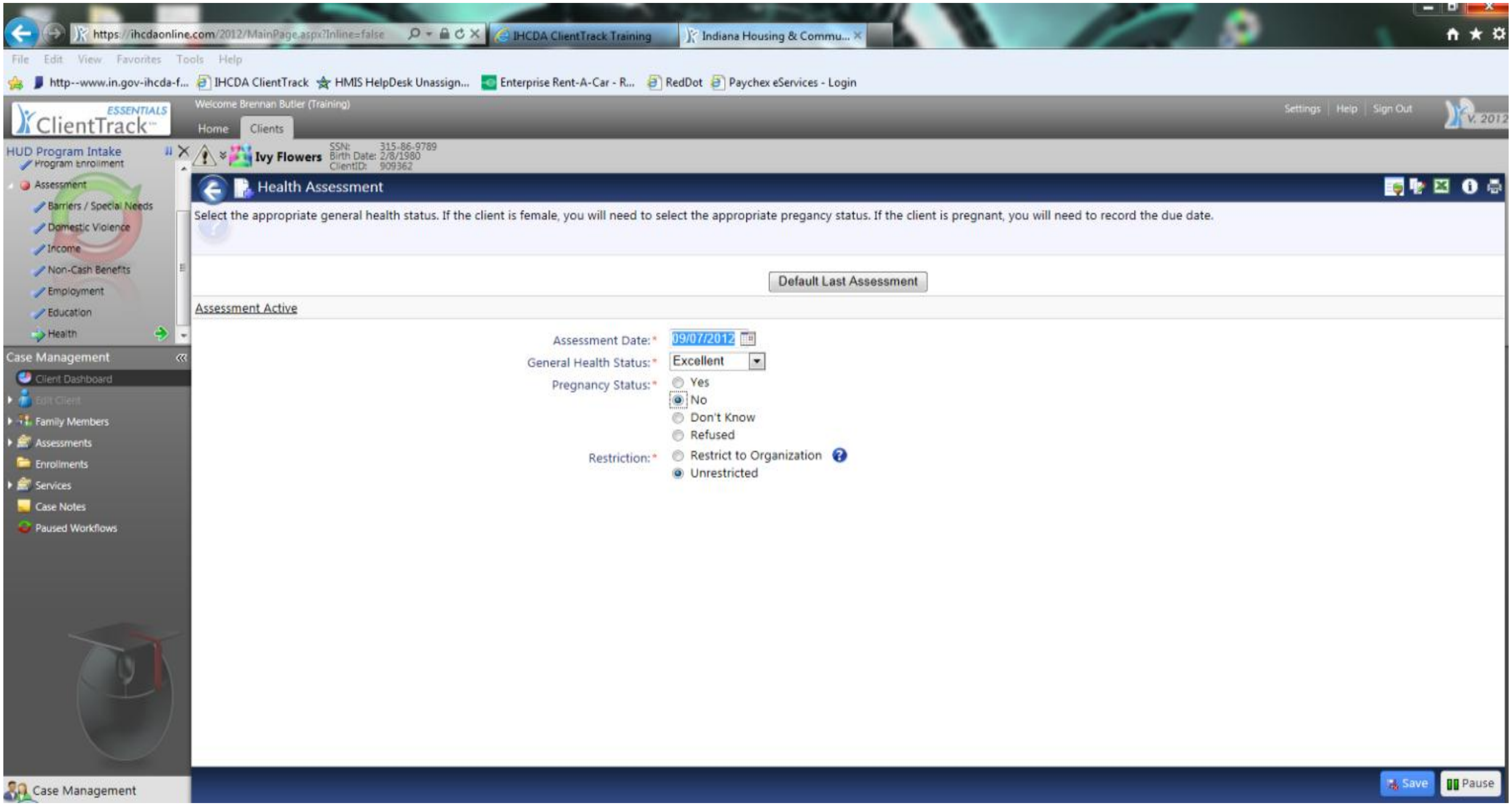
Adult Education Assessment

When filling out the Adult Education Assessment, remember certain answers will prompt the built in logic to require more information. Please note that if a client has had some secondary education, but has received a degree you should select “**Post-Secondary School**” and the select “**None**” in the Secondary Education box. Click “**Save**” to continue.



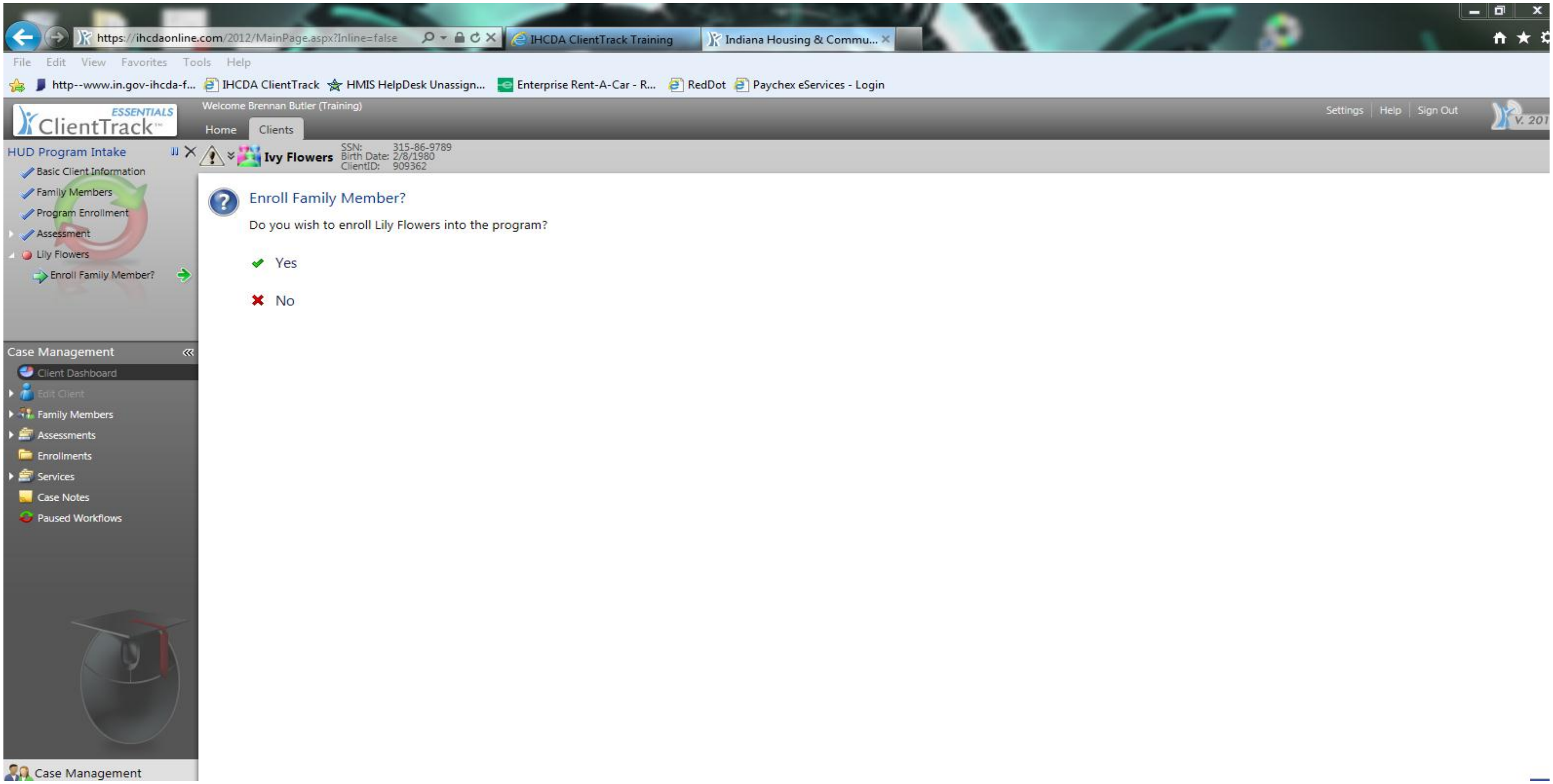
Health Assessment

Note: (Female Only) If you say “Yes” to the Pregnancy Status, it will ask you for the Due Date of the unborn child. Click “**Save**” when completed.


Health Assessment
Select the appropriate general health status. If the client is female, you will need to select the appropriate pregancy status. If the client is pregnant, you will need to record the due date.
Default Last Assessment
Assessment Active
Assessment Date:*
09/07/2012
General Health Status:*
Excellent
Pregnancy Status:*
Yes
No
Don't Know
Refused
Restriction:*
Restrict to Organization
Unrestricted
Save
Pause

Enrollment process for Child and/or other Household Member

Click the “**Yes**” button.



Universal Data Assessment

Assessment Date – Date the assessment was completed with the client (field will auto-fill with today’s date)

Veteran Status – Identify if this client is a Veteran, if you select "Yes" additional information will be required

Disabling Condition – Identify if this client has any disabilities

Residence Prior to Program Entry – Identify where the client was staying on the night before the client is enrolled in your program

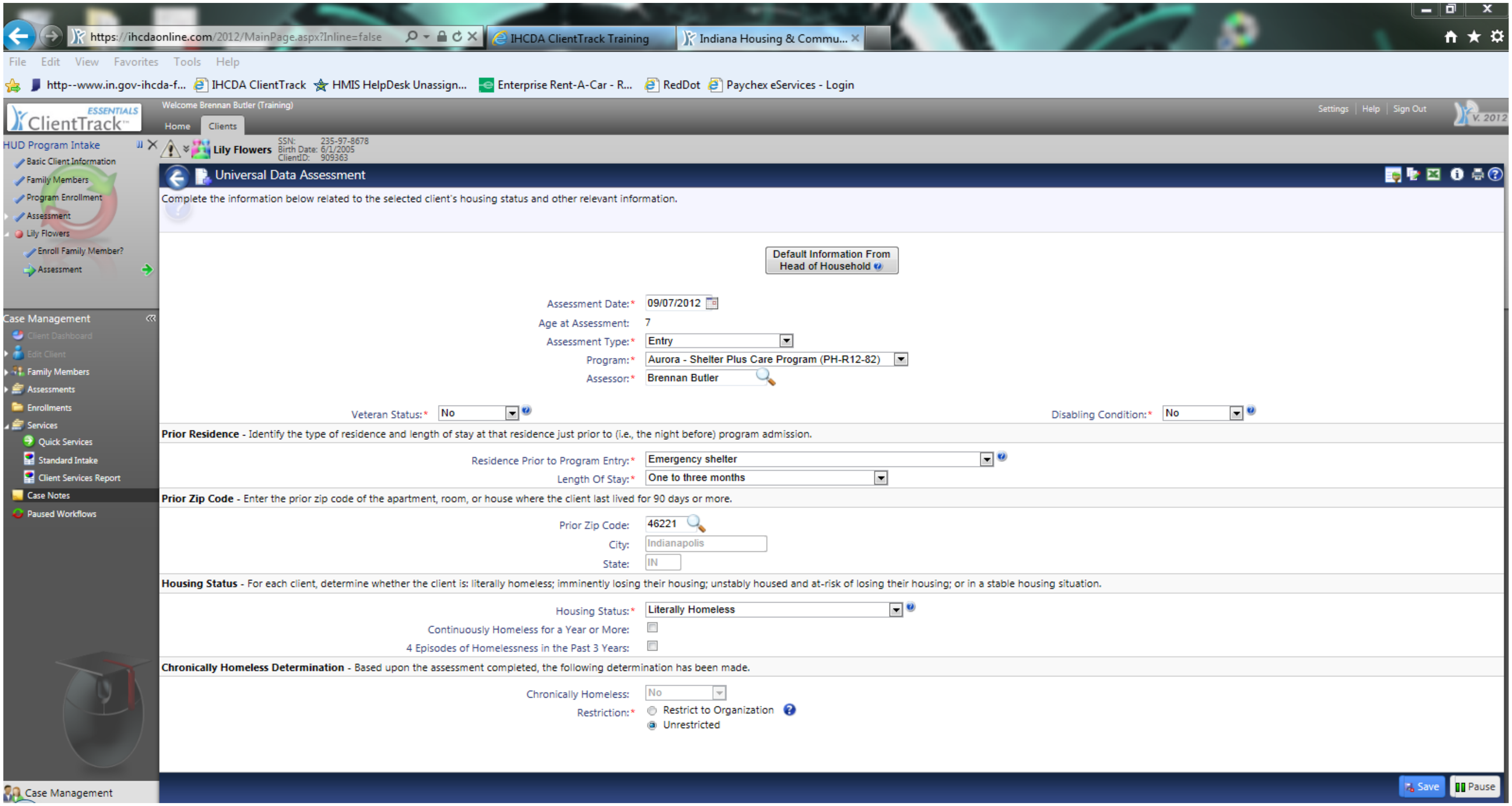
Length of Stay – Identify the length of stay for the residence prior to program entry

Prior Zip Code – Remember this is the *zip code of the client's last permanent residence of 90 days or more*. The system allows you to look up the zip code if the client knows the city, but not the specific zip code. Click on the look up icon and type in the city and state and a list of potential matches will be displayed. Choose one of the zip codes from list provided.

Housing Status – Choose the appropriate category for the housing status of the household. More extensive definitions can be found by clicking the blue information circle next to the drop down box.

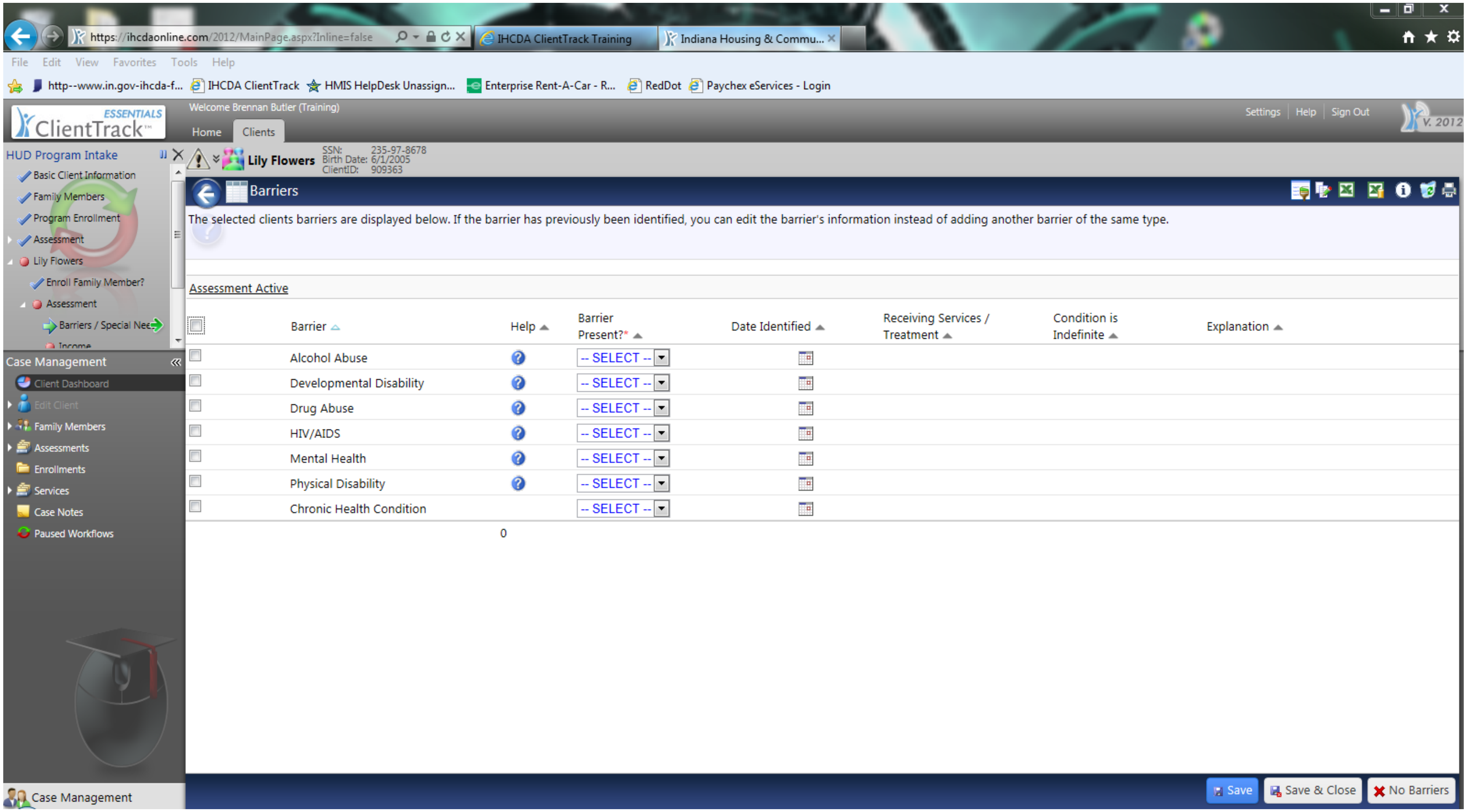
Chronic Homeless Assessment - In order for a client to be chronically homeless, they must be unaccompanied; and continually homeless for a year or more or 4 episodes of homelessness in a 3 year period; and have a substance abuse disorder, serious mental illness, developmental disability or a chronic physical illness or disability. When the qualifying conditions are checked appropriately, the system will indicate the client's status of chronically homeless.

Once the Universal Data Assessment is completed, click "**Save**".



HMIS Barriers

The built in logic may create additional fields that are required. All fields with a red * are required. If the client has no barriers, click on the No Barriers button in the lower right hand corner. It is important to keep in mind that clients must have at least one barrier to be eligible for some programs (such as Shelter + Care). Click "**Save & Close**" when completed.



Financial Assessment Cash Benefits

Remember this is the financial assessment for the second household member (and in this case, a child). Children are typically only going to have minimal options on this list such as SSI (death benefits). TANF, Food Stamps and Child Support remain as income for the parent/guardian – not the child.

Earned Income – Employment income

Other Income – Any income not previously listed

Unemployment Insurance – Unemployment benefits from the State

Private Disability Insurance – Non-government funded disability payments

Worker's Compensation – Income for individual who has been injured on the job

Self-Employment – Income earned by an individual who works for themselves

Supplemental Security Income – A federal program that provides additional income for older and disabled people with little to no income stream

Veteran's Disability Payment – Disability payment provided by the Department of Veteran's Affairs

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Other Pension – Cash payment made from a private employer

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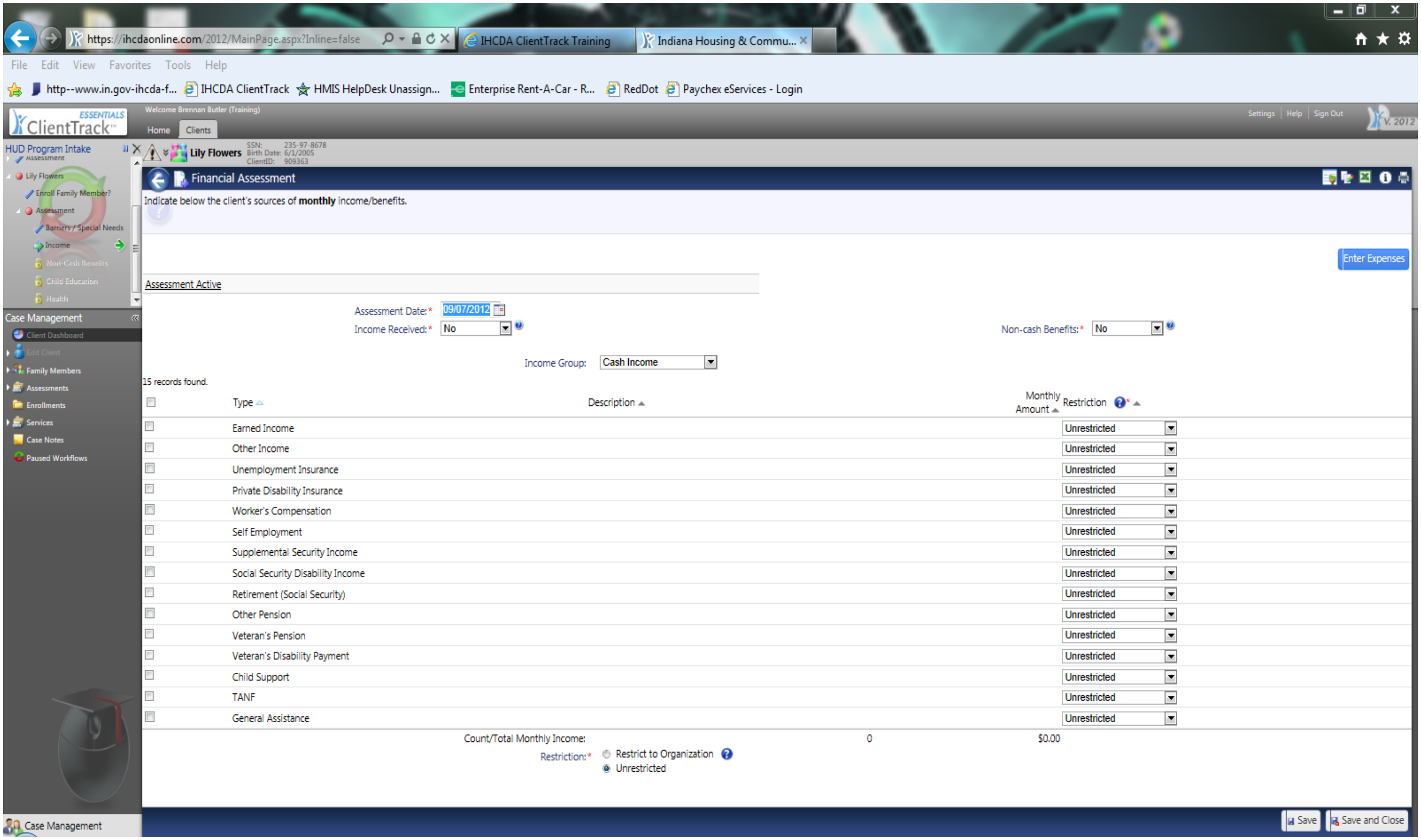
Veteran's Disability Payment – A benefit paid to a veteran because of injuries or diseases that happened while on active duty, or were made worse by active duty

Child Support – Income received from one parent to another to care for children

TANF –Temporary Assistance for Needy Families

General Assistance – Cash from household or friends, trustee or church/non-profit

Click "**Save and Close**" when completed.



Financial Assessment Non-Cash Benefits

This section is specific to individual, not the household. An Income Assessment will be completed for each household member. Again, there are limited selections which will pertain to children (Medicaid).

Food Stamps/Money for Food on Benefits Card – Monthly payments provided to individual in advance in a tax refund, Food Stamps (Snaps) – A stamp or coupon, issued by the government to persons with low incomes that can be redeemed for food at stores

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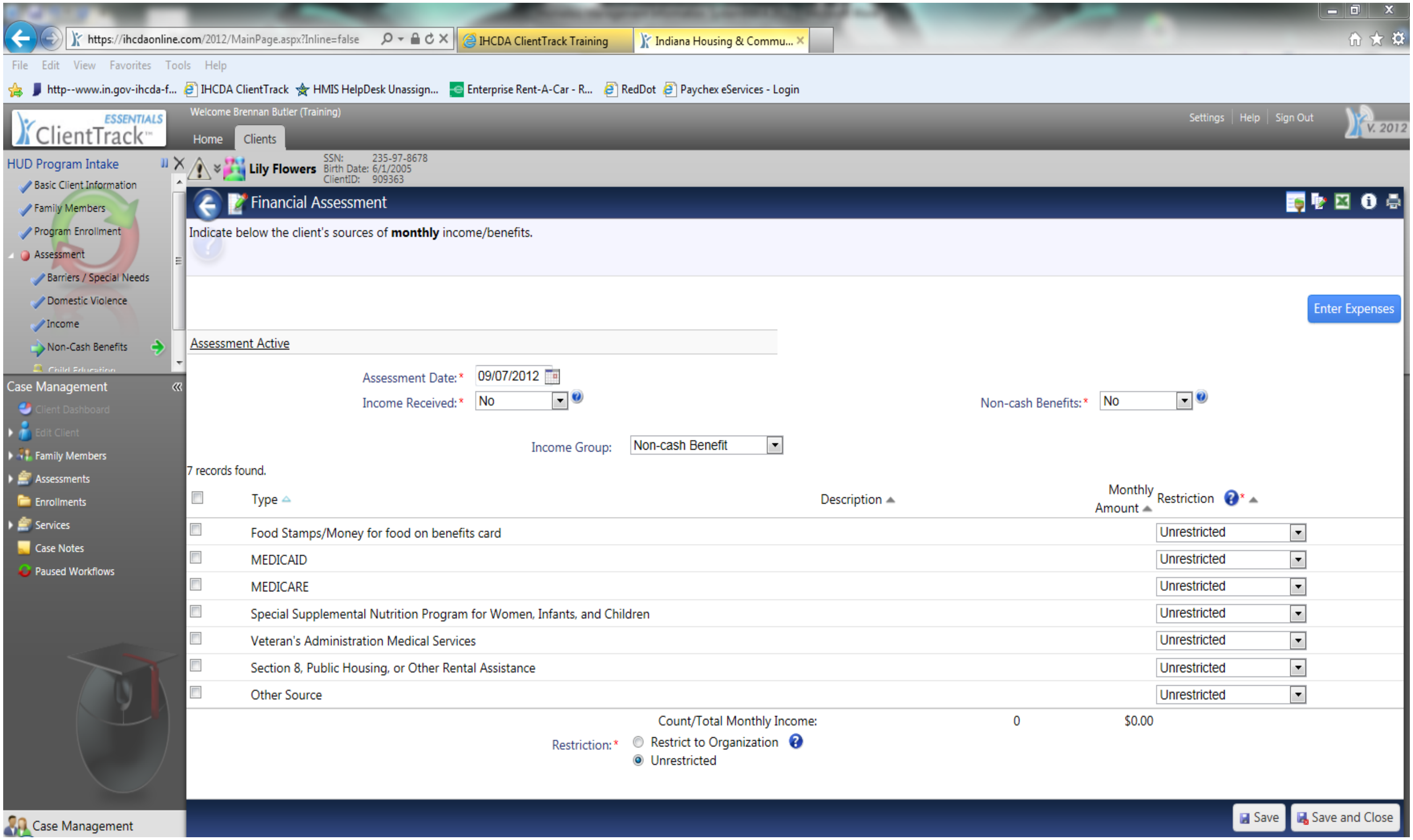
Veteran's Administration Medical Services - Health care benefits and service provided for Veterans

Section 8, Public Housing or Other Rental Assistance – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development

Other Source – Any source not previously listed above

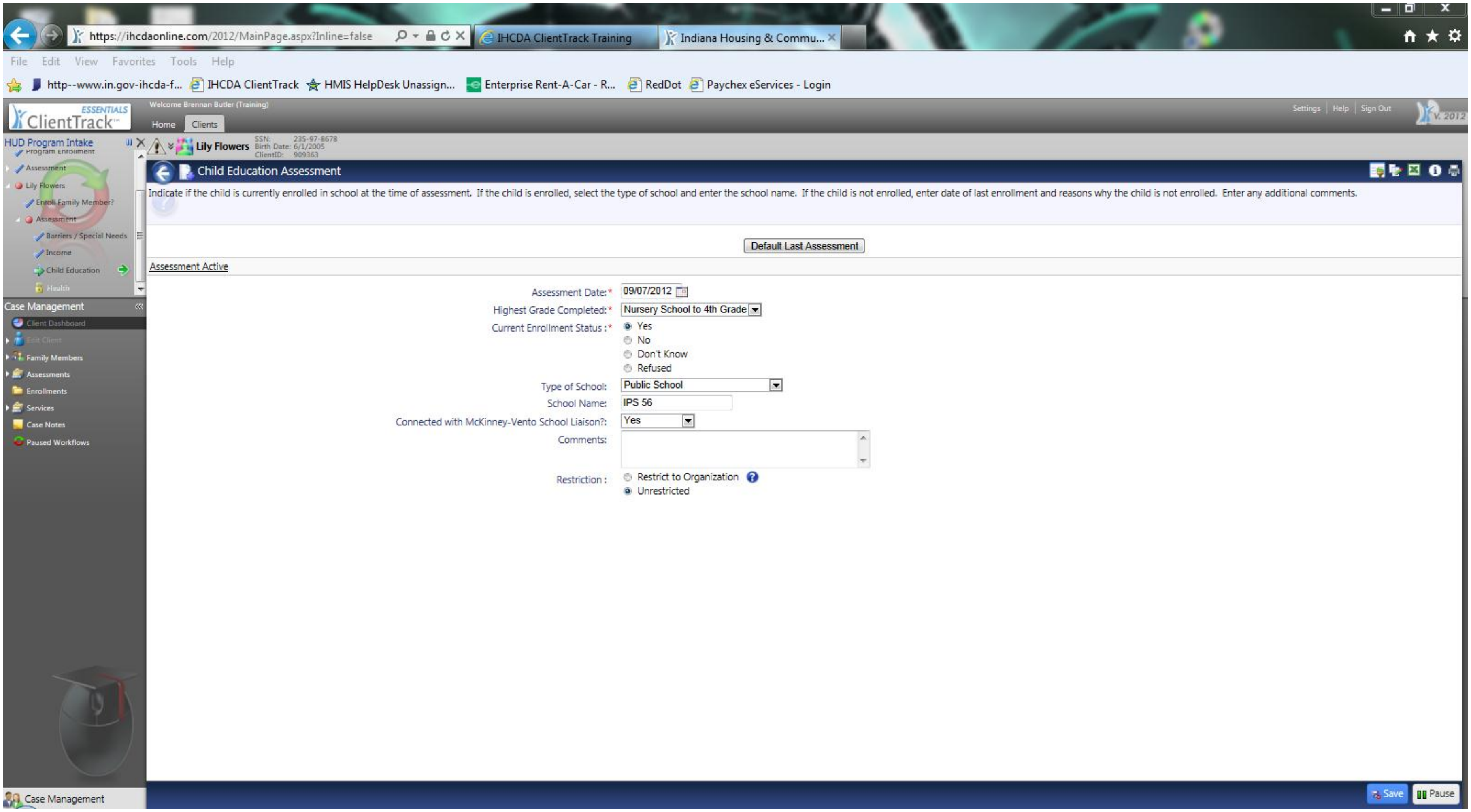
Click "**Save and Close**" when completed.



Child Education Assessment

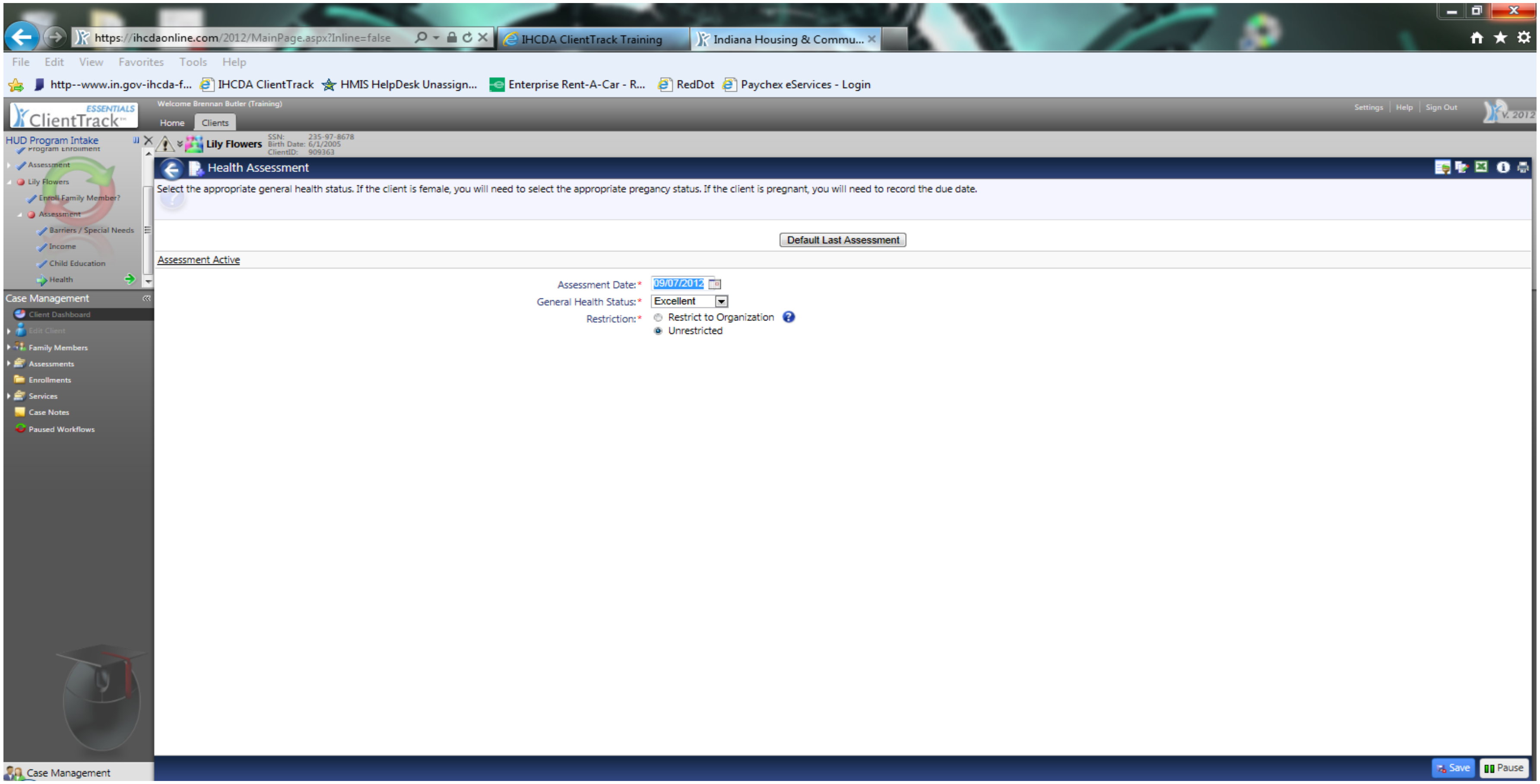
Enter the "**Highest Grade Completed**" for the child, and then select if the child is "**Currently Enrolled in School**". The built in logic may require further information depending on how you answer the questions. Click

"**Save**" when completed.

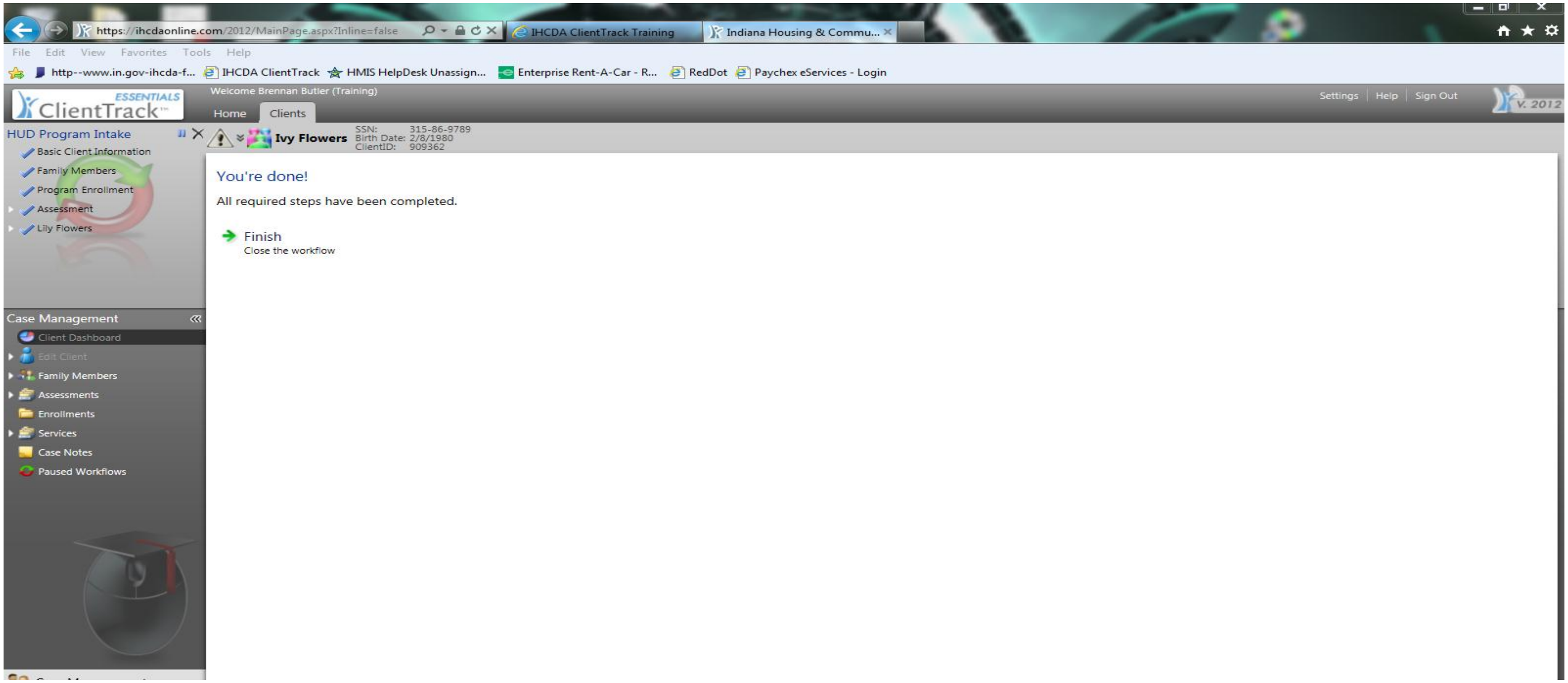


Health Assessment

The answer to this question is up to the client or the parent of the client. If you notice that they are not as they describe, then you would want to note that in your case notes. Click "**Save**" when completed.



All steps for the assessment and enrollment process have been completed. Upon clicking the "**Finish**" button, you will be redirected to the Dashboard for the Head of Household. It is from this screen you will begin to add services and case notes regarding the HMIS Program Enrollment.



Tech Note

Household member icons are color-coded

Adult male household members have a blue icon

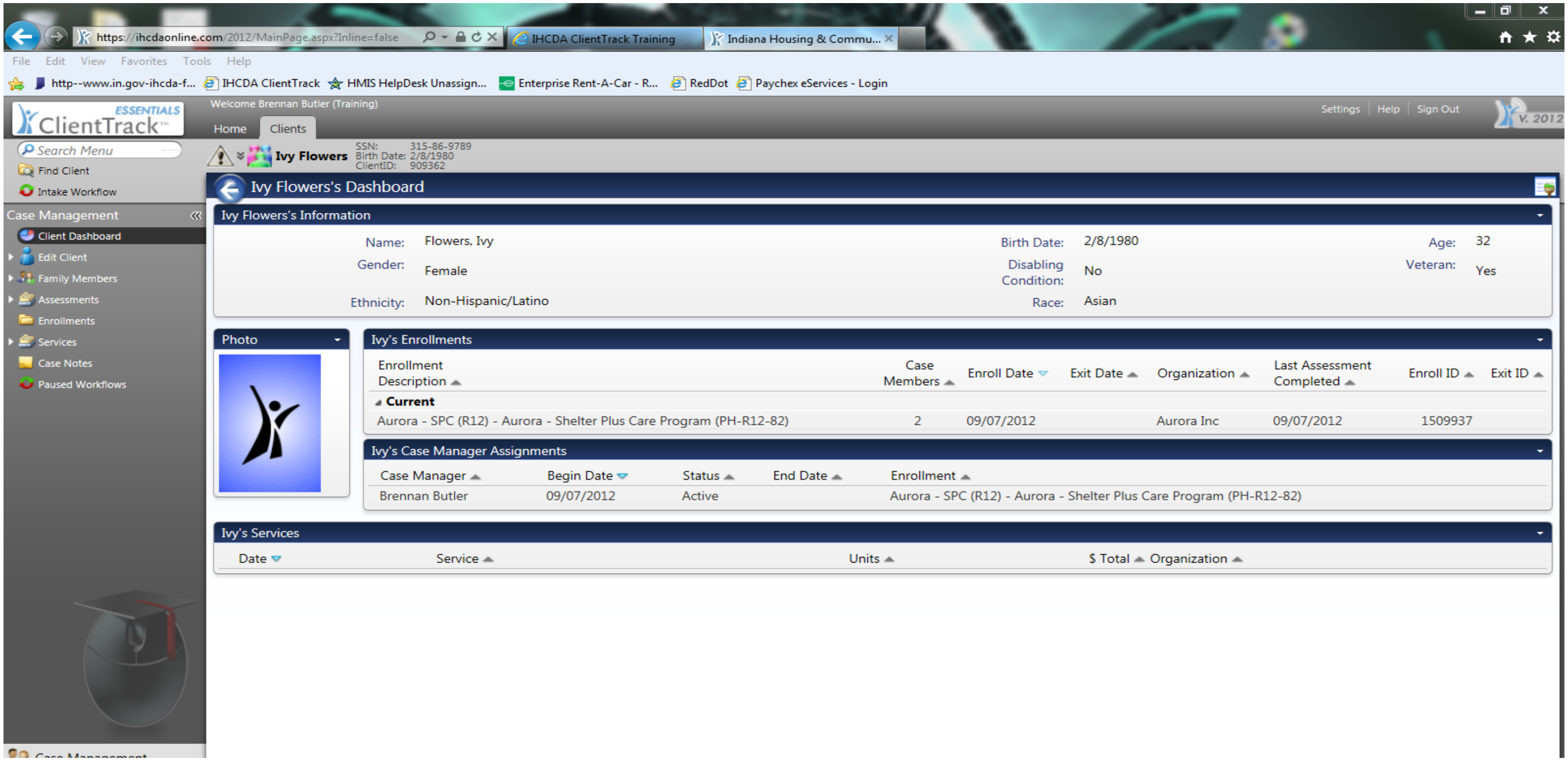
Adult female household members have a pink icon

Children have a green icon

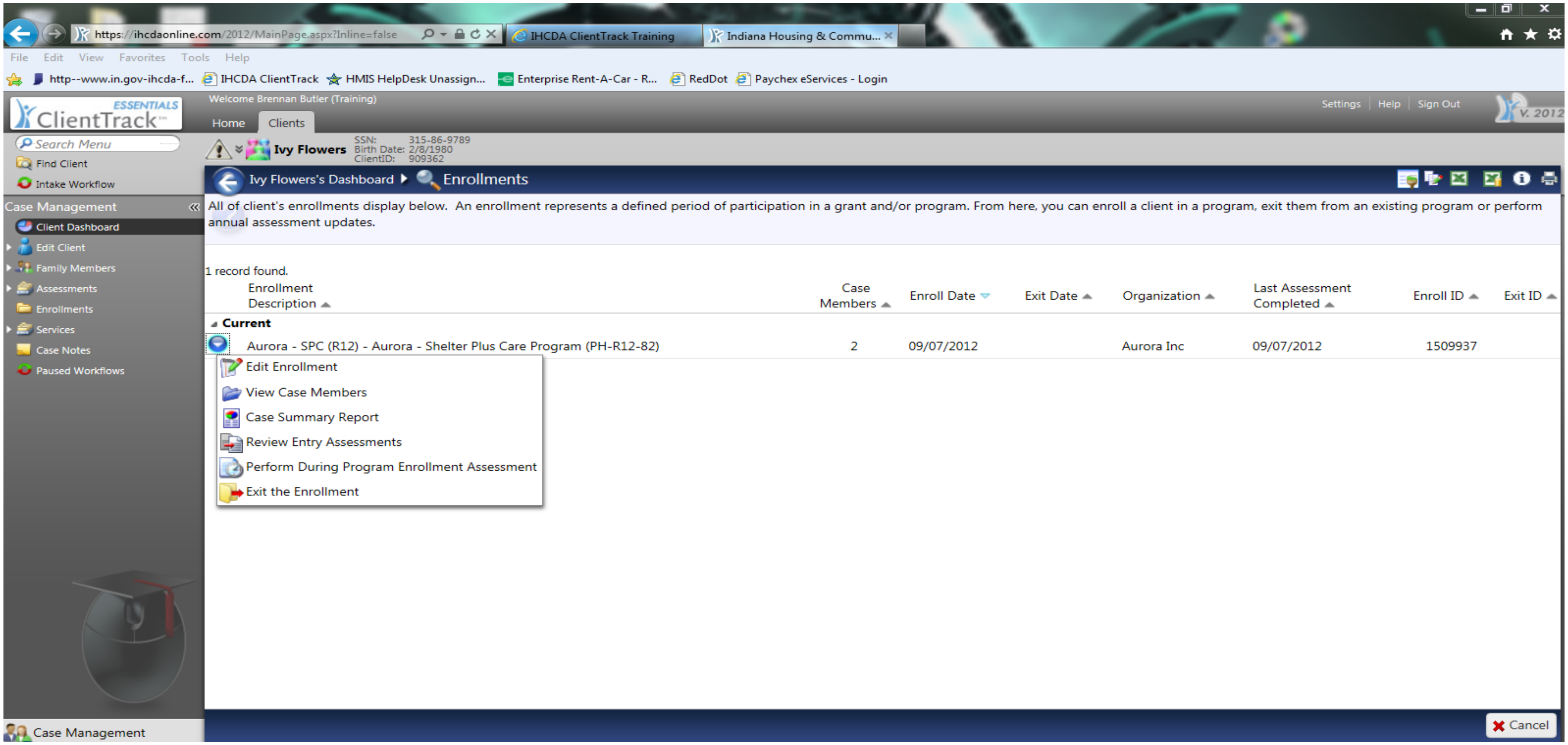
The Client Dashboard

The Client Dashboard provides you with a great deal of information regarding the client. You can verify the basic client demographics, see the enrollment in a particular program, number of case members, enrollment date, the associated organization and when their last Assessment has been completed. It will also provide you with an "at a glance" look at the services the client has received.

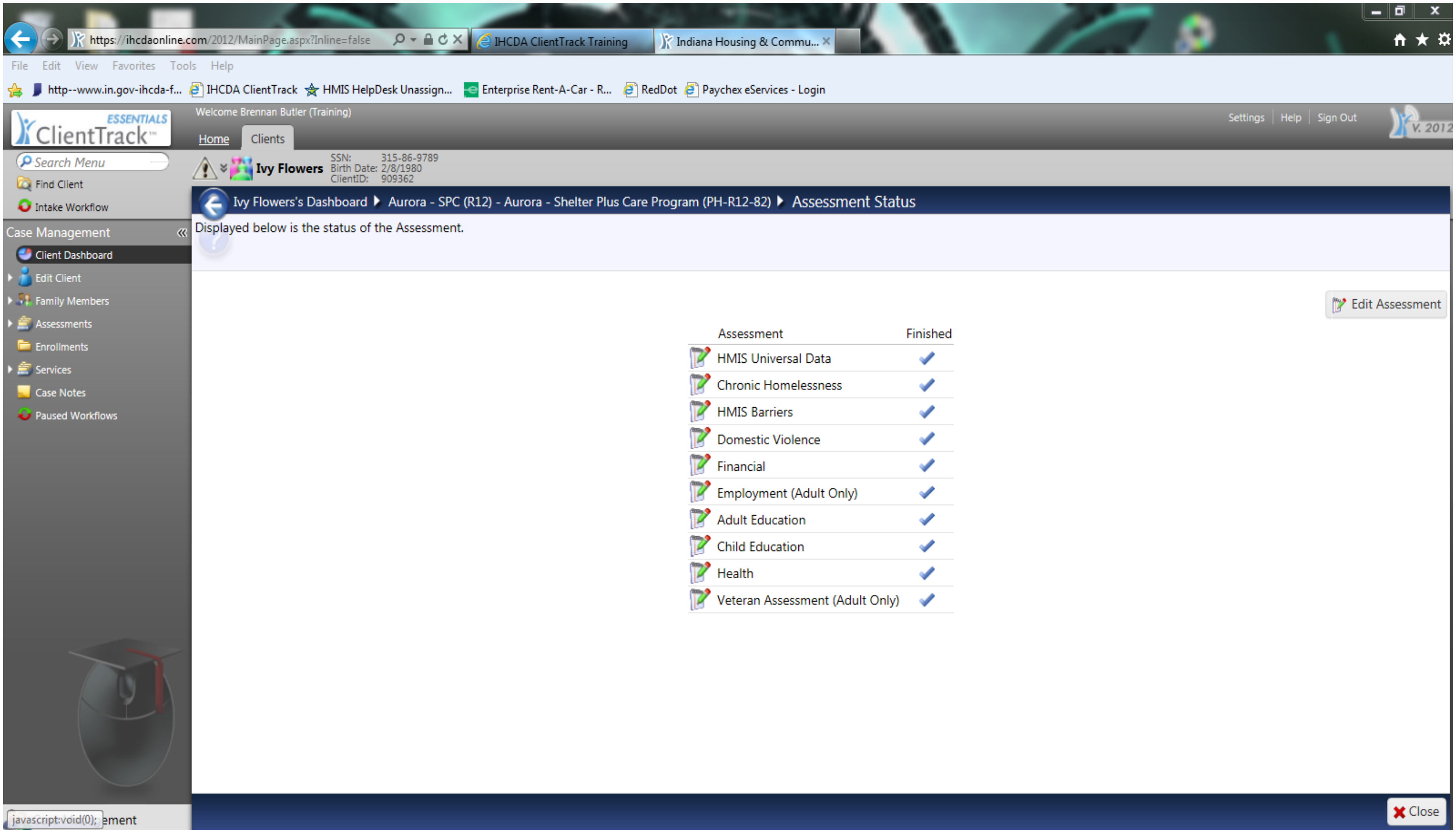
While you will have the option on many screens for a "Don't Know or Refused" option – which may be valid at time of intake – it is expected that as information is collected during the program enrollment the client information/assessments will be updated. The screen shots that follow will help you access a previously completed assessment should you need to make corrections.



Click on the "**Enrollment**" menu item on the left, or you can click on the "**Blue Bar**" that says "**Client Name Enrollments**". Choose the enrollment that needs to be edited and click on the "**Blue Play Button**" to produce a drop down menu. You can either Edit Enrollment (maybe the date needs to be changed, name is misspelled, etc.) View Case Members, Case Summary Report, Perform During Program Enrollment Assessment or Exit the Enrollment.



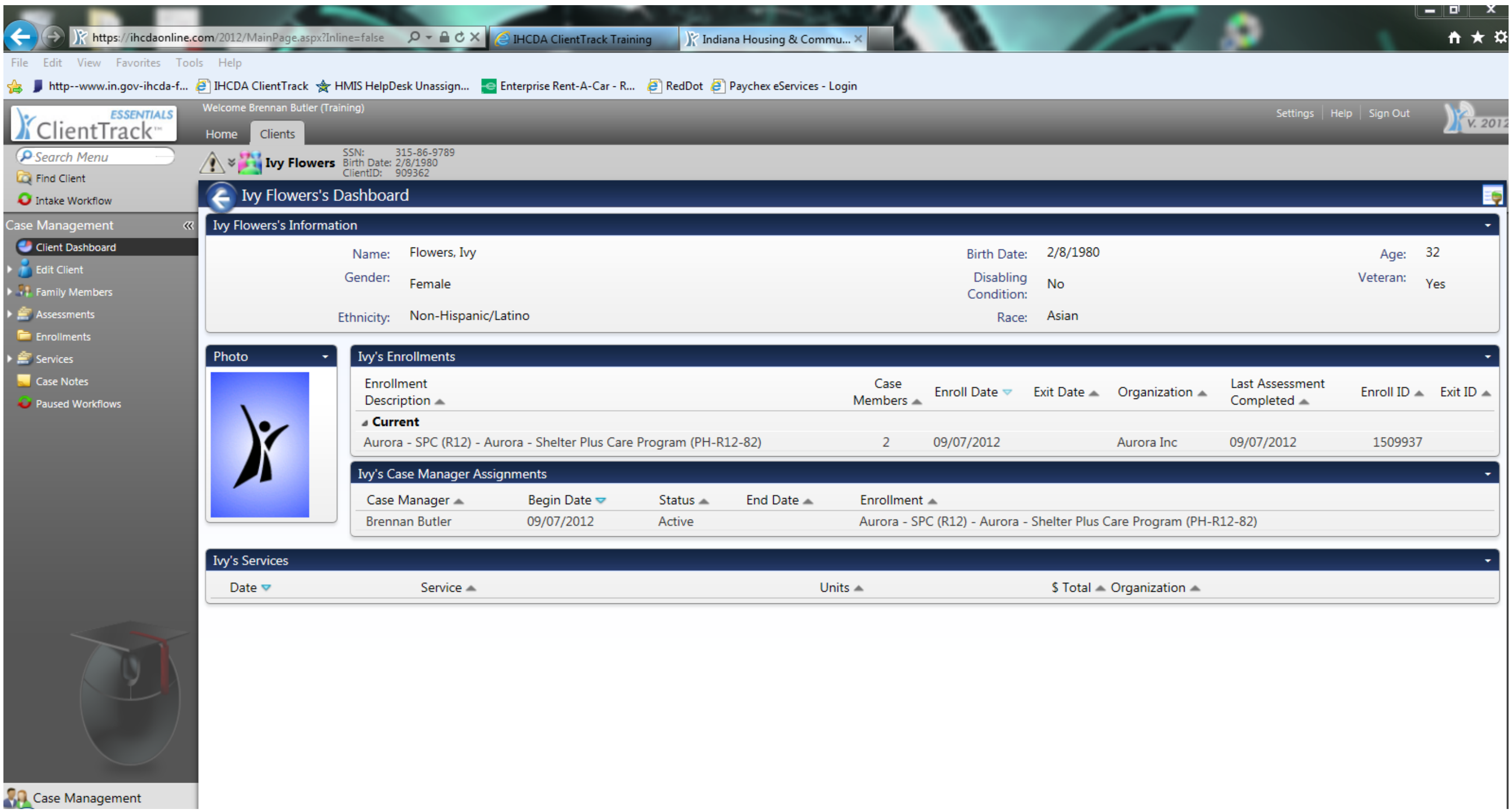
Click on “**Blue Play Button**” and then click on “**Review Entry Assessments**” in the drop down list.



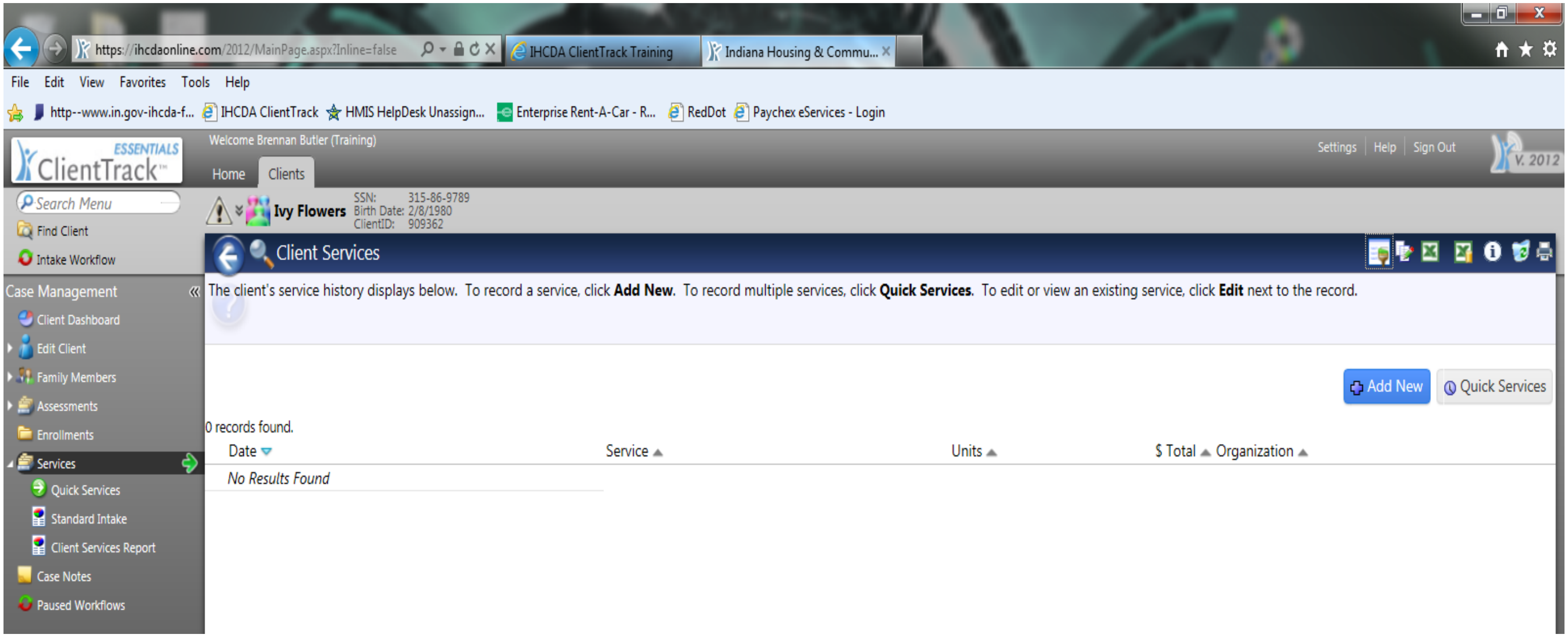
As you can see when you select "Review Entry Assessments", all required assessment have been completed. For instance, if a client does not disclose at entry they are receiving food stamps but you find out soon after their enrollment, you would want to **EDIT** the Financial Assessment (To "**Edit**" an assessment click on the

"**Notepad with the Green Pencil**", put in the updated information. Click "**Save**"). However, if the client BEGAN receiving Food Stamps while enrolled in your program (1-2 months later); DO NOT edit the entry assessment. This is a time to complete a "During Program Enrollment Assessment." (This will be covered later in the manual)

Adding Services



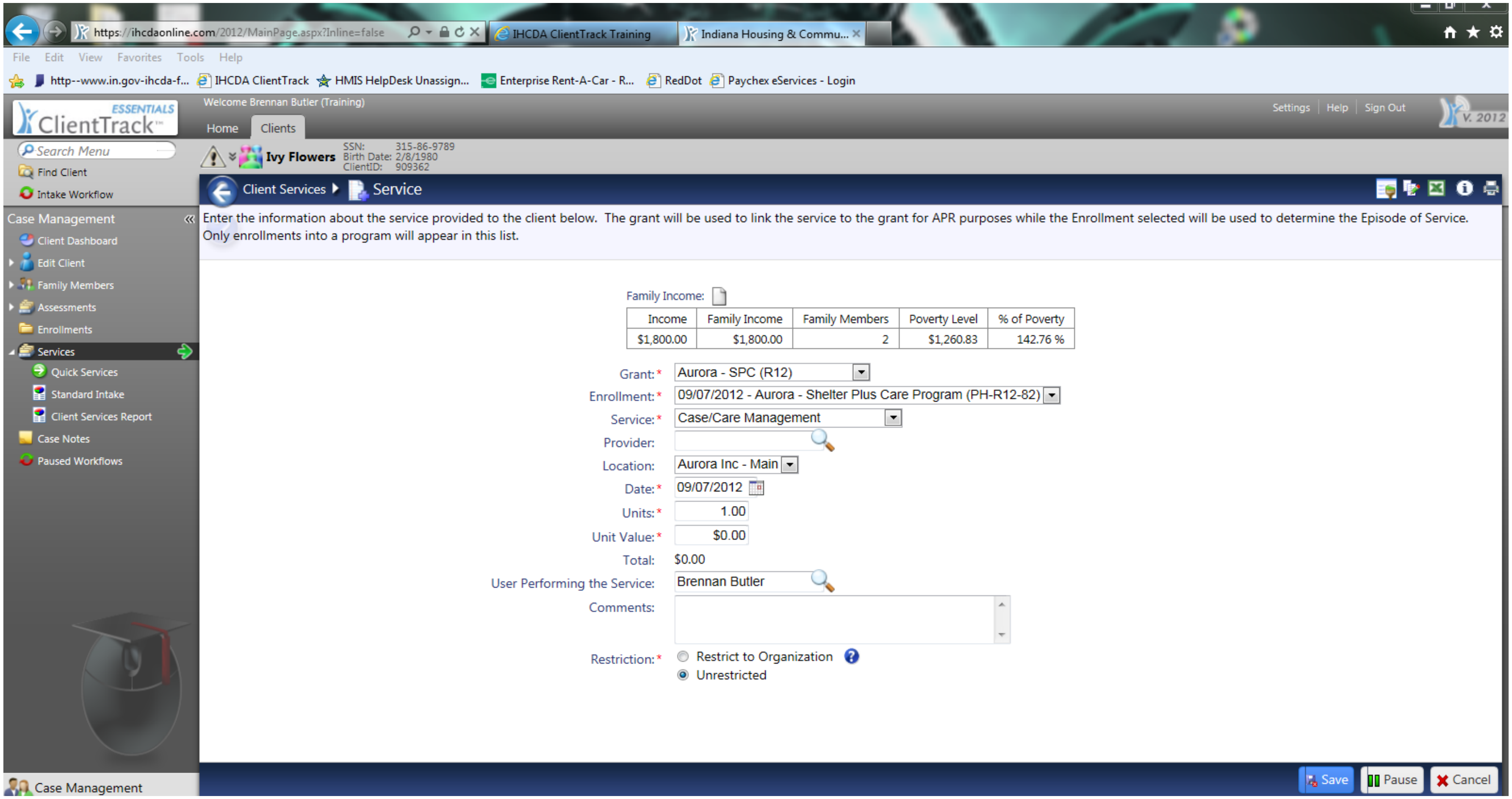
To add services go to the left hand menu items, and then click on the "**Services**" link, this will open the Services Window.



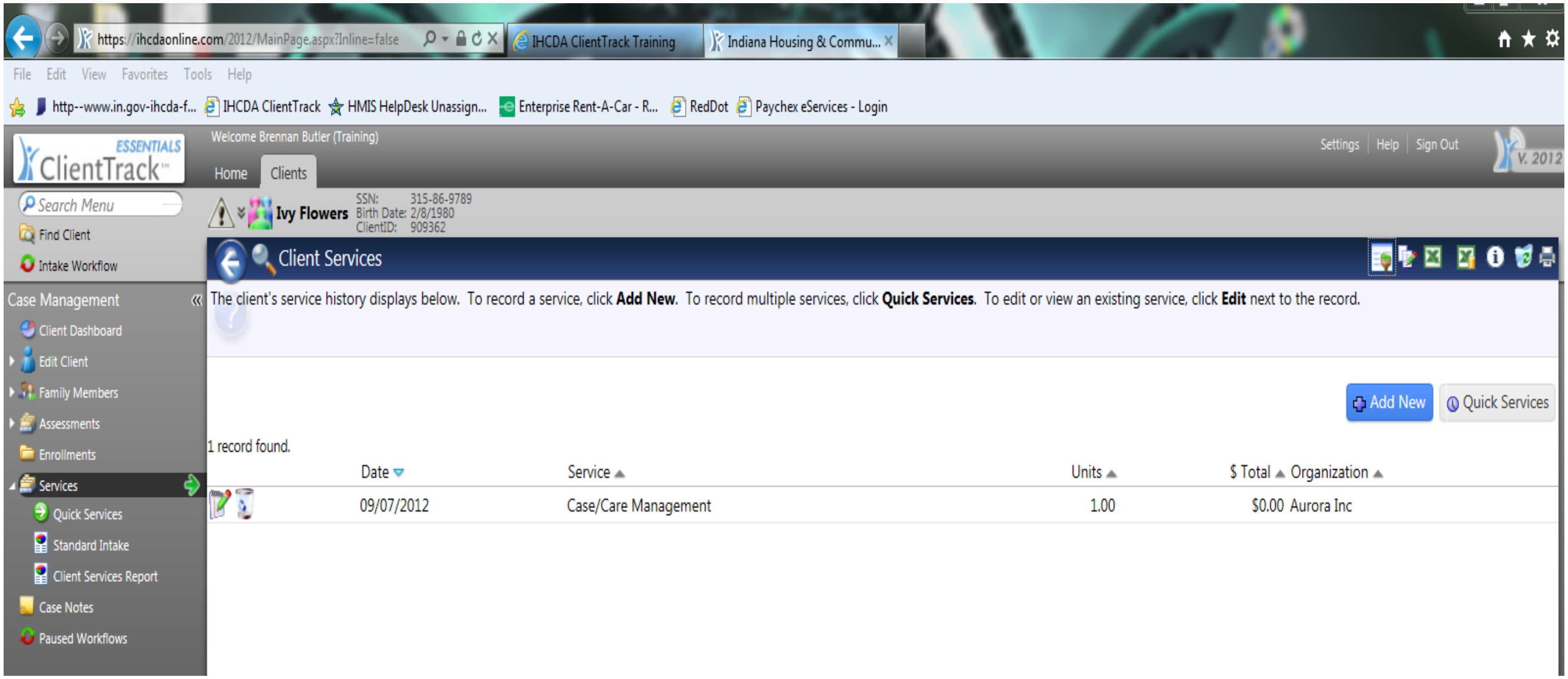
Click on the "**Add New**" Button

***NOTE –** You will have the option to Add Quick Services (for use when you are adding multiple services for a client that were performed on the same day). For services that may require some additional information, use the Add New button.*

You now see the **Services Screen**, you will need to **select your grant, enrollment, and the service provided**. You can also enter units to track costs. The comments section can be used for reminders; however, this is not the area to write your case notes. Case Notes will be covered later in the manual. When you are finished documenting services click on the “**Save**” Button.

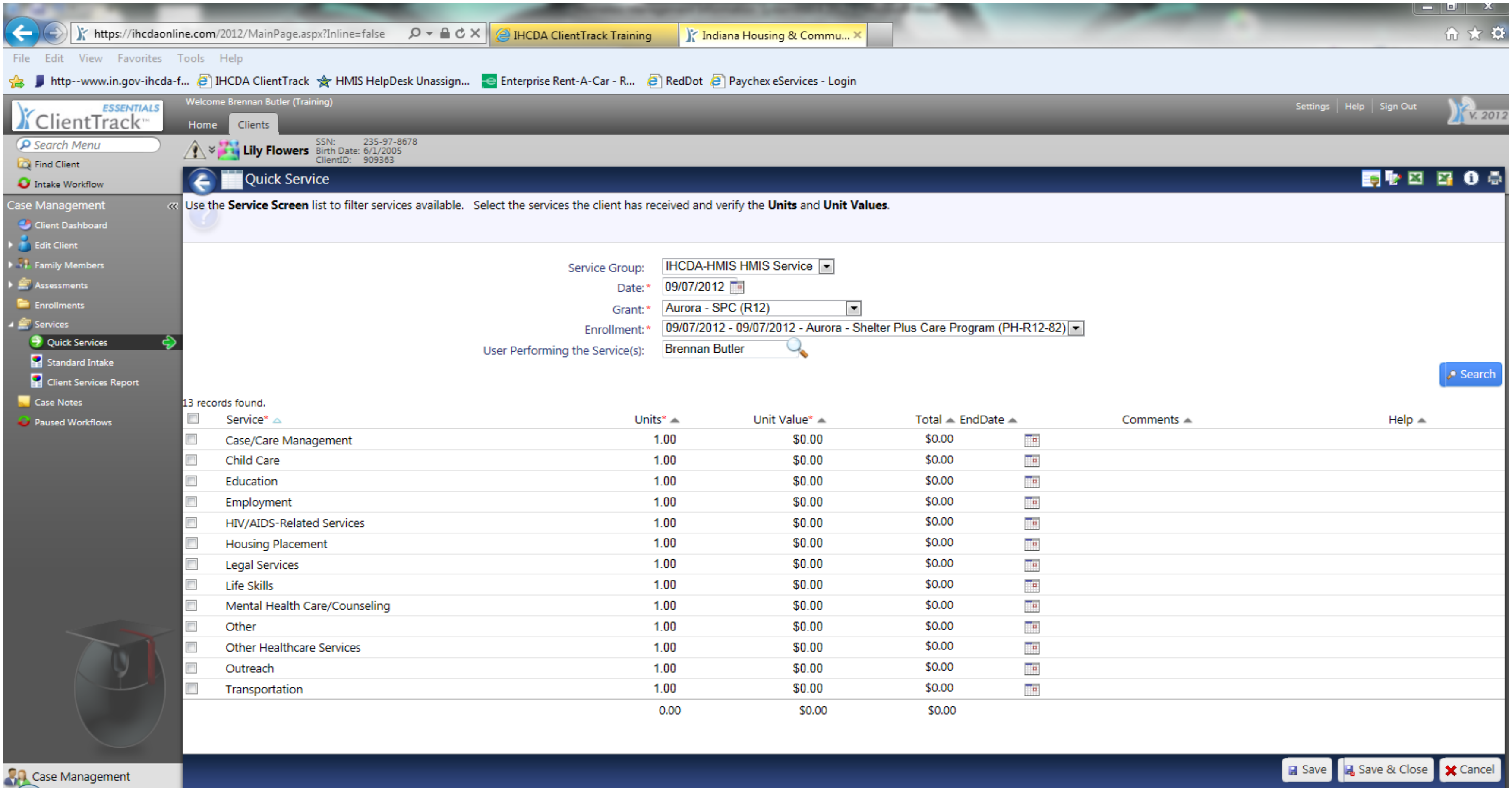


Once you have clicked on the “**Save**” Button, you will be brought back to the Service home screen, from here you are able to edit or delete a service that you provided.



Quick Services

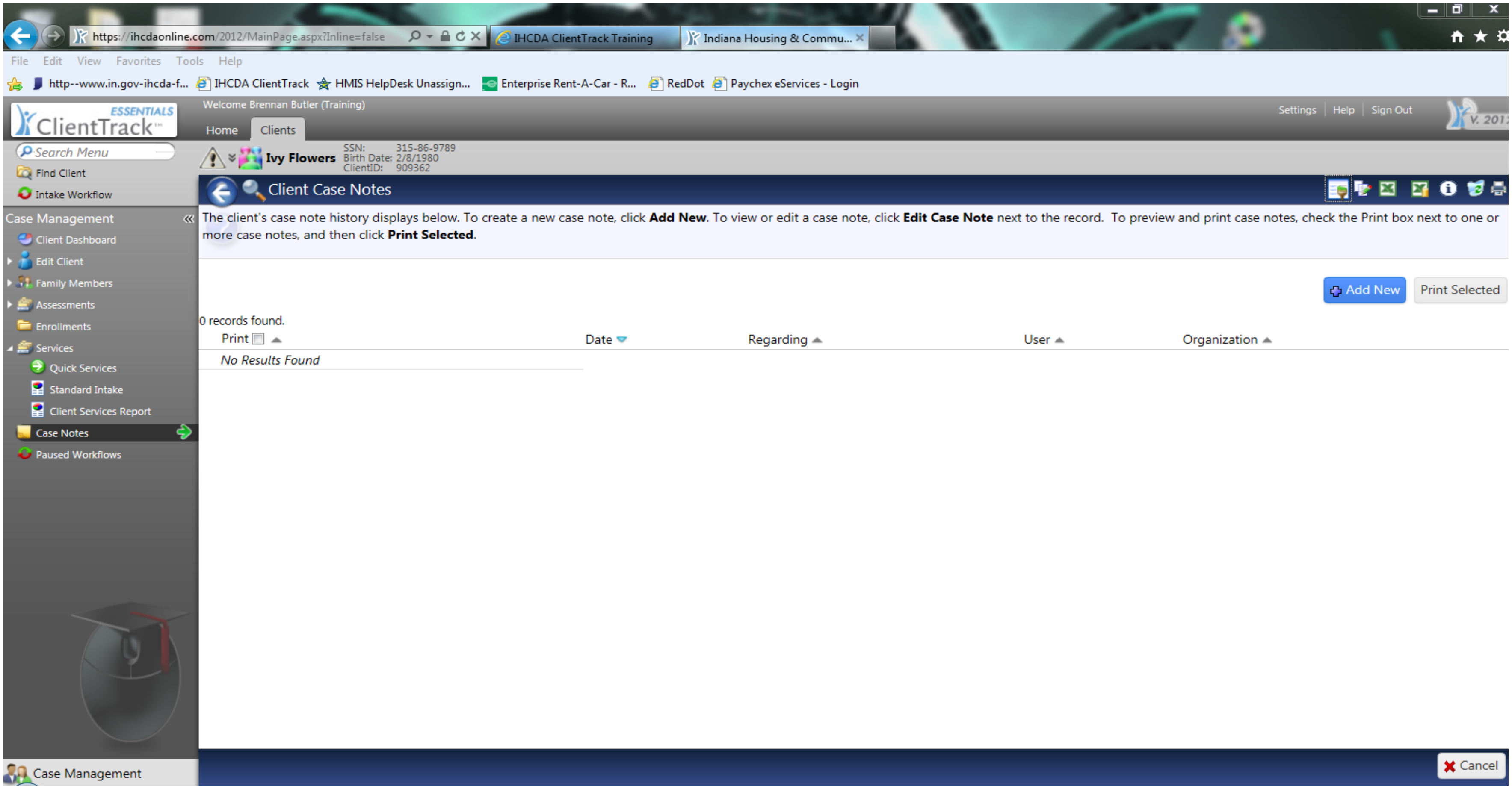
When you are adding more than one service on a client, the easiest way will be to use the "**Quick Services**" Button located at the top right corner of your screen next to the "Add New" button. With this feature you will be able to add multiple services to a client at one time. You will need to select your "**Grant and Enrollment**", as well as the "**Check Box**" next to the Service you provided. Once you are finished adding services click on the "**Save and Close**" Button.



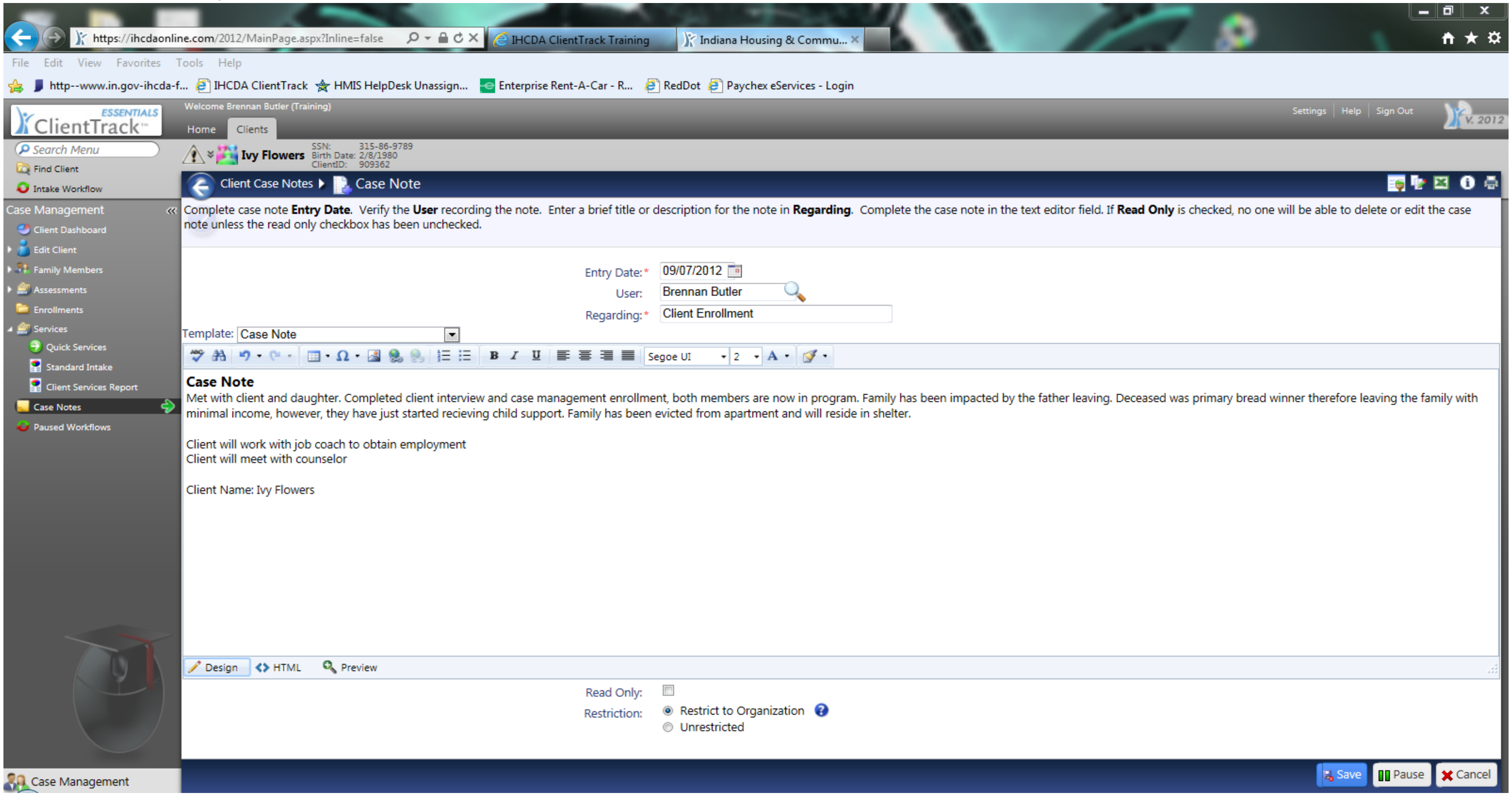
Case Notes

Timely and robust case notes assist you and other case managers at your organization in serving your clients. It is extremely important that meetings, calls and other relevant information regarding your client are properly documented in their case notes.

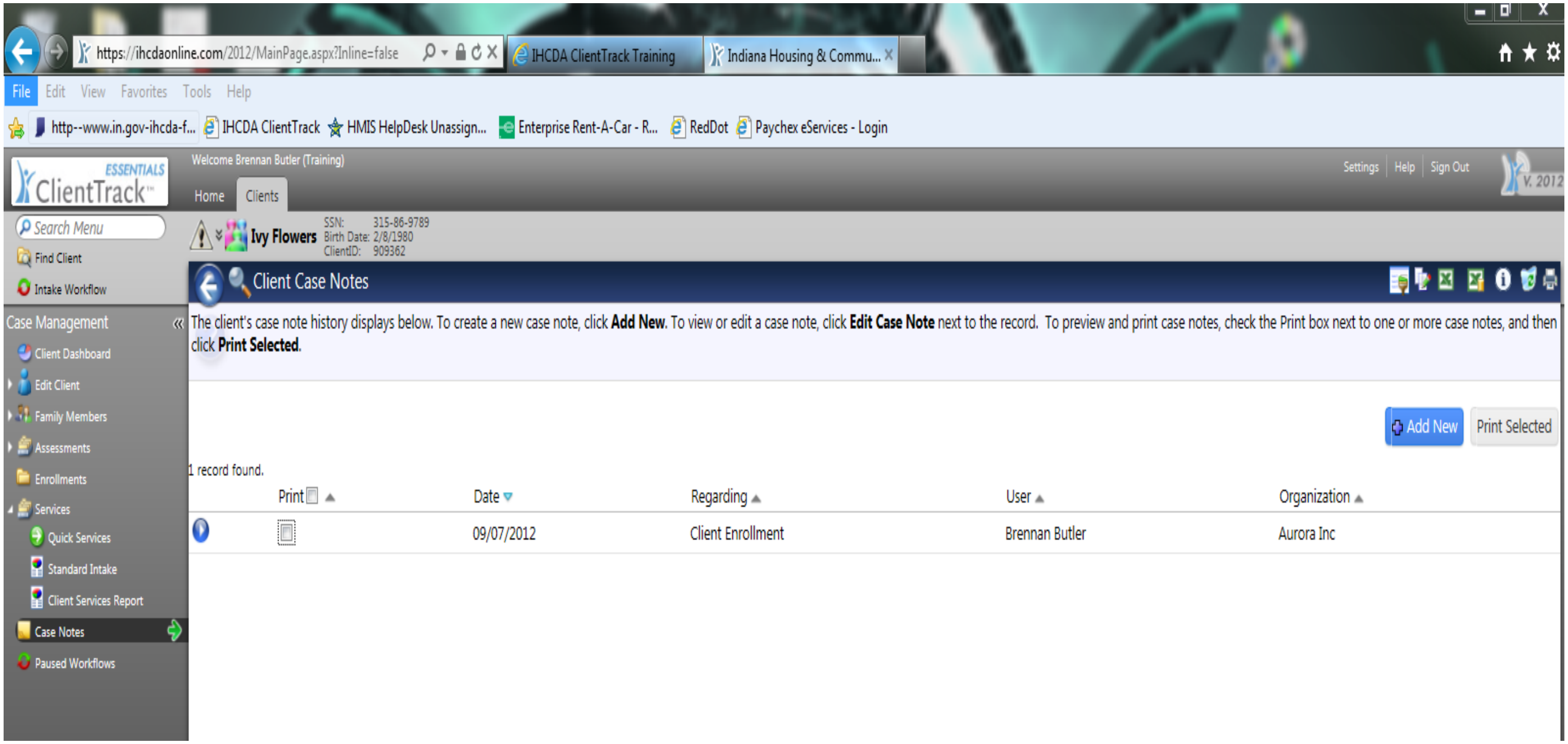
To add Case Notes, click on the "**Case Notes**" Menu Item on the left of the screen. Click on the "**Add New**" button on the upper right hand side of the screen. Remember, these case notes will be restricted to case managers in your organization so if you are apt to use abbreviations, make sure others in your agency will be able to decipher what you have written. While ClientTrack™ will eventually provide a date in the body of the case note; it is also good practice to add the date in your case note.



Here is an example of Case Notes:



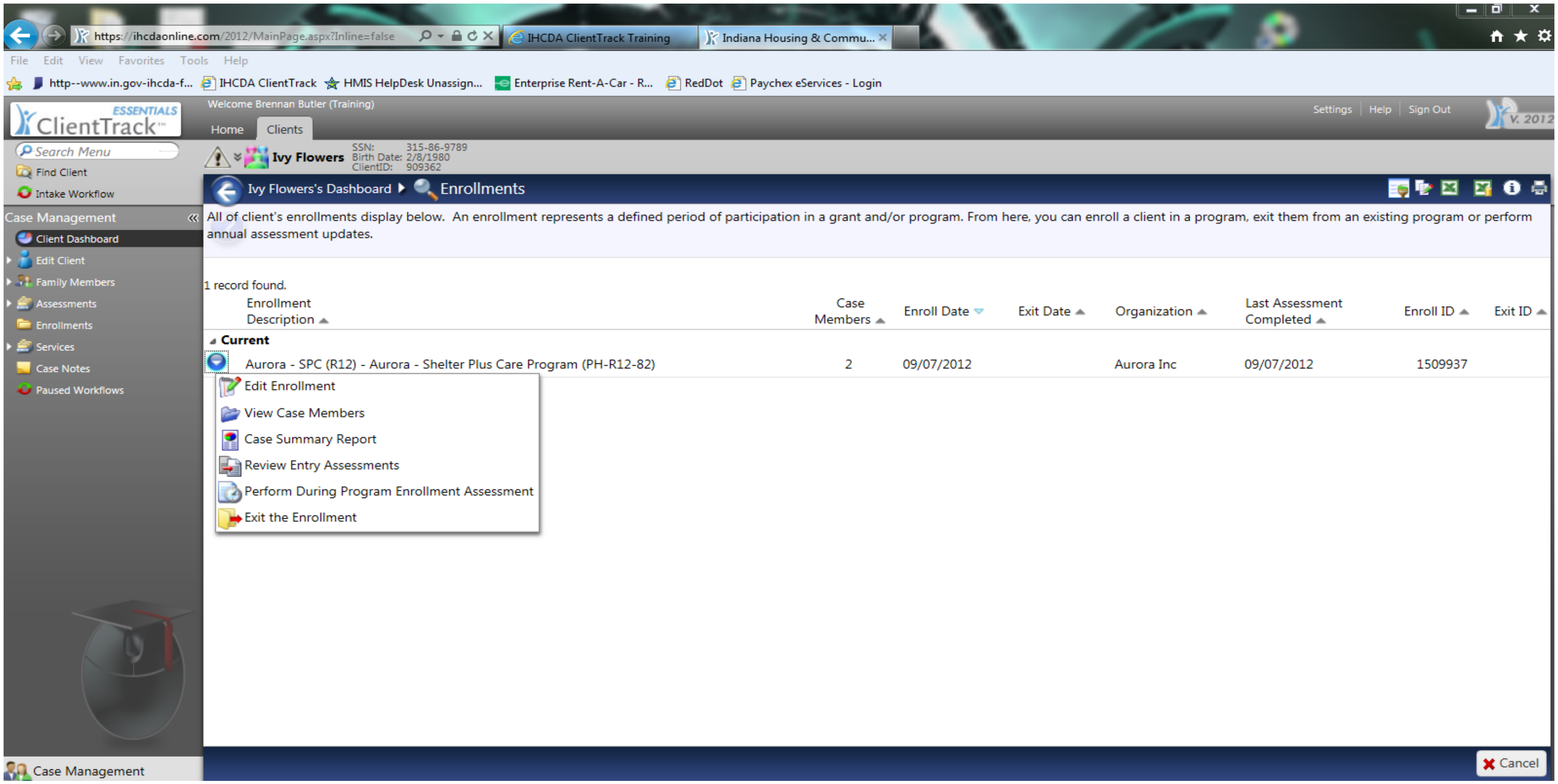
Once you have added your Case Notes click on the "**Save**" button at the bottom of the screen. You will be re-directed to the Case Notes screen, where you will be able to print, edit, or delete your case notes.



During Program Assessment

For clients that spend longer periods of time in your program, you now have access to a “During Program Assessment”. This assessment is now required if you have clients in your program for a year or longer. You may also want to complete this assessment if you have a new member (birth of a child) to the household or if someone in the household departs (divorce) your program. You can also use this workflow to track and maintain significant changes to a household income, etc. For your convenience, the assessment has been developed as a workflow with the following steps:

To perform a During Program Assessment click on either the "**Enrollments**" link on the left hand menu area, or you can click on the blue bar that says "**Client Name Enrollments**", either of these will take you to the Enrollments screen.

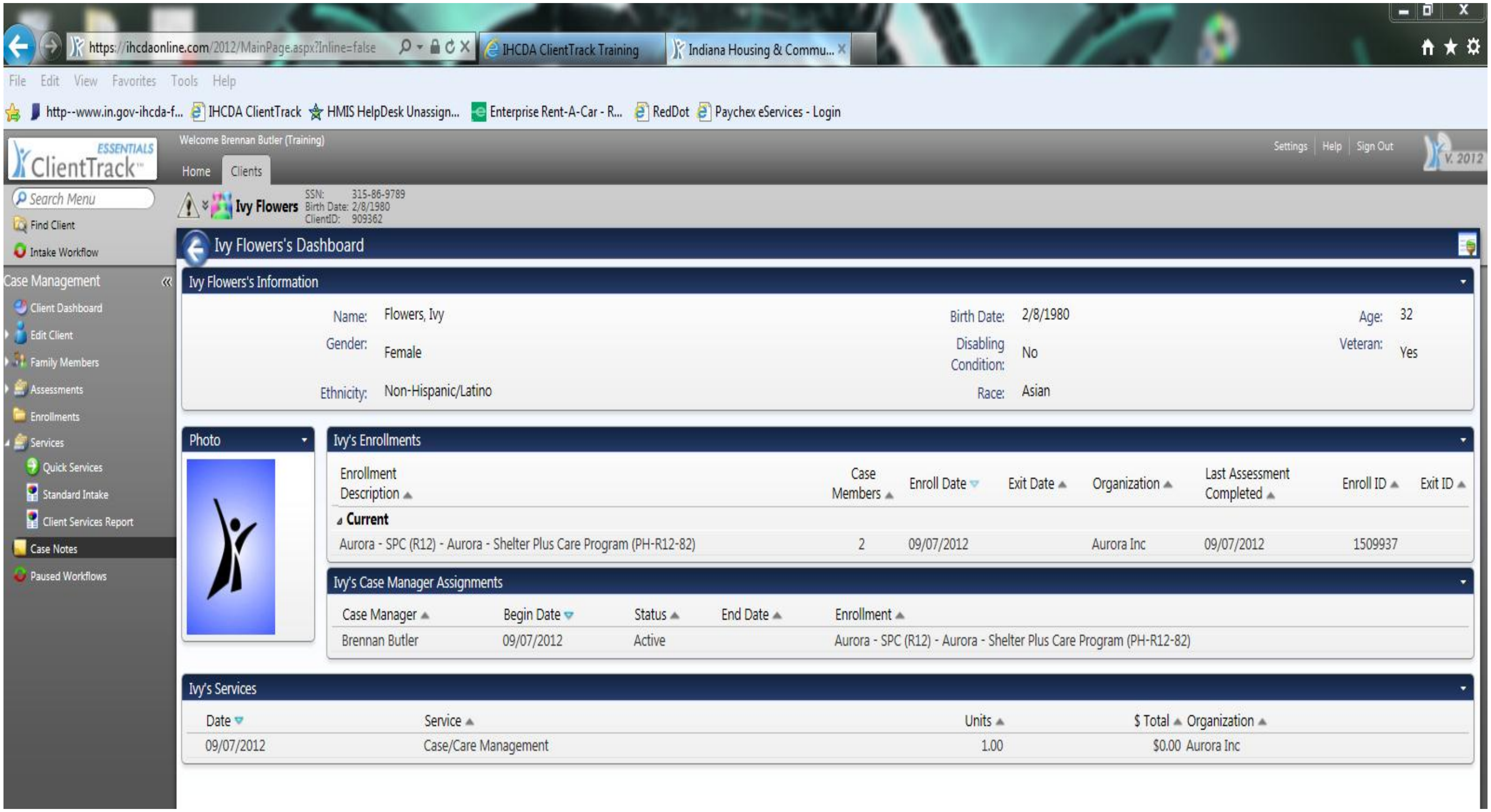


Click the "**Blue Play Button**", and then click on "**Perform During Program Enrollment Assessment**", this will launch a During Program Enrollment Assessment Workflow. For your convenience, the assessment has been developed as a workflow with the following steps (For further instructions look back at Enrolling a client):

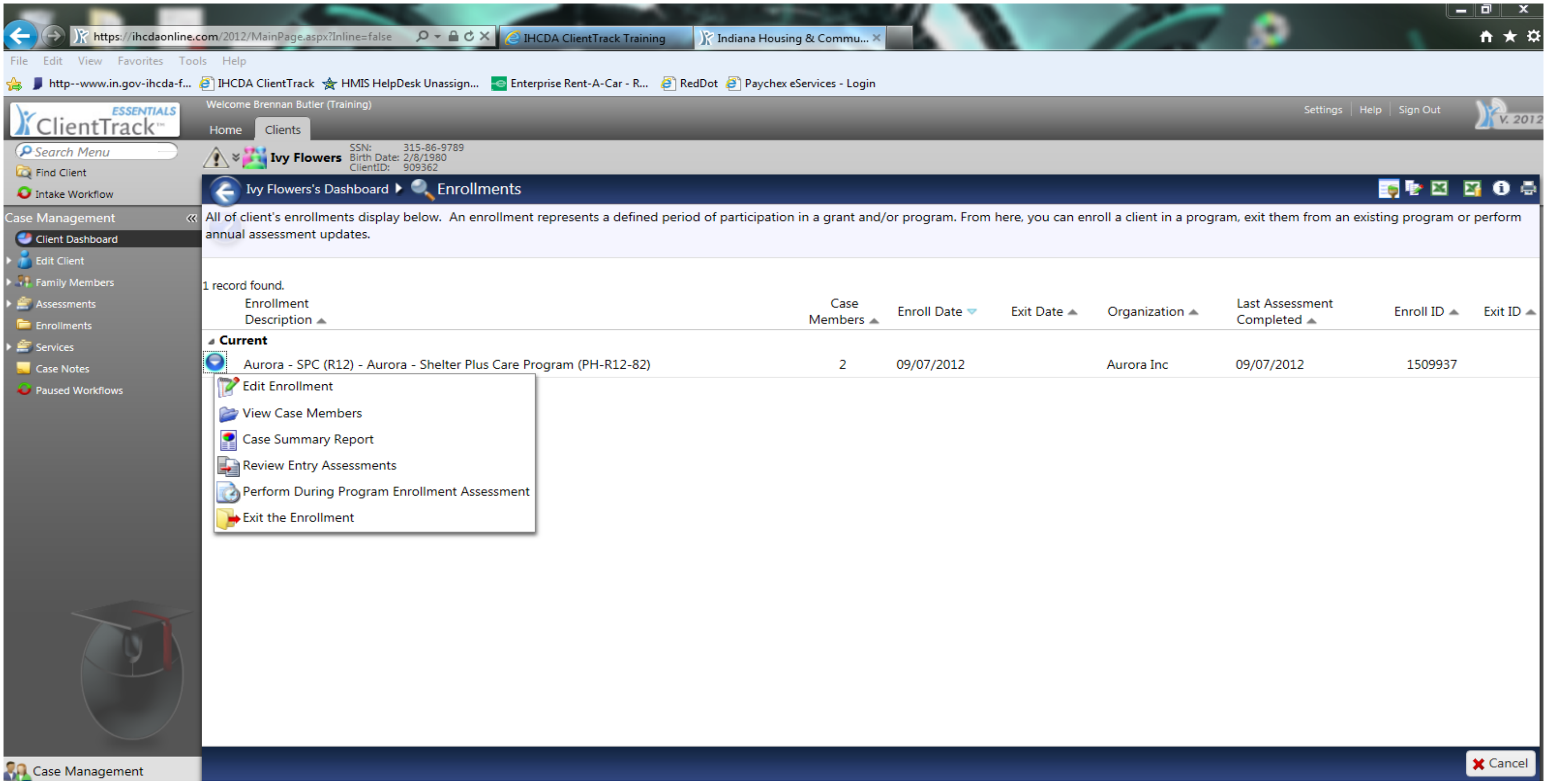
1. Verify and make any necessary changes to basic client information
2. Verify and make any necessary changes to household information
3. Master Assessment-During Program Enrollment is completed
    a. Review of HMIS Barriers
    b. Financial Assessment (Cash and Non-cash)
    c. Employment Assessment
    d. Education Assessment
    e. Health Assessment
    f. Perform Household Members Assessments
4. Click “**Finish**” and you will be redirected to the Client Dashboard

Exit Client

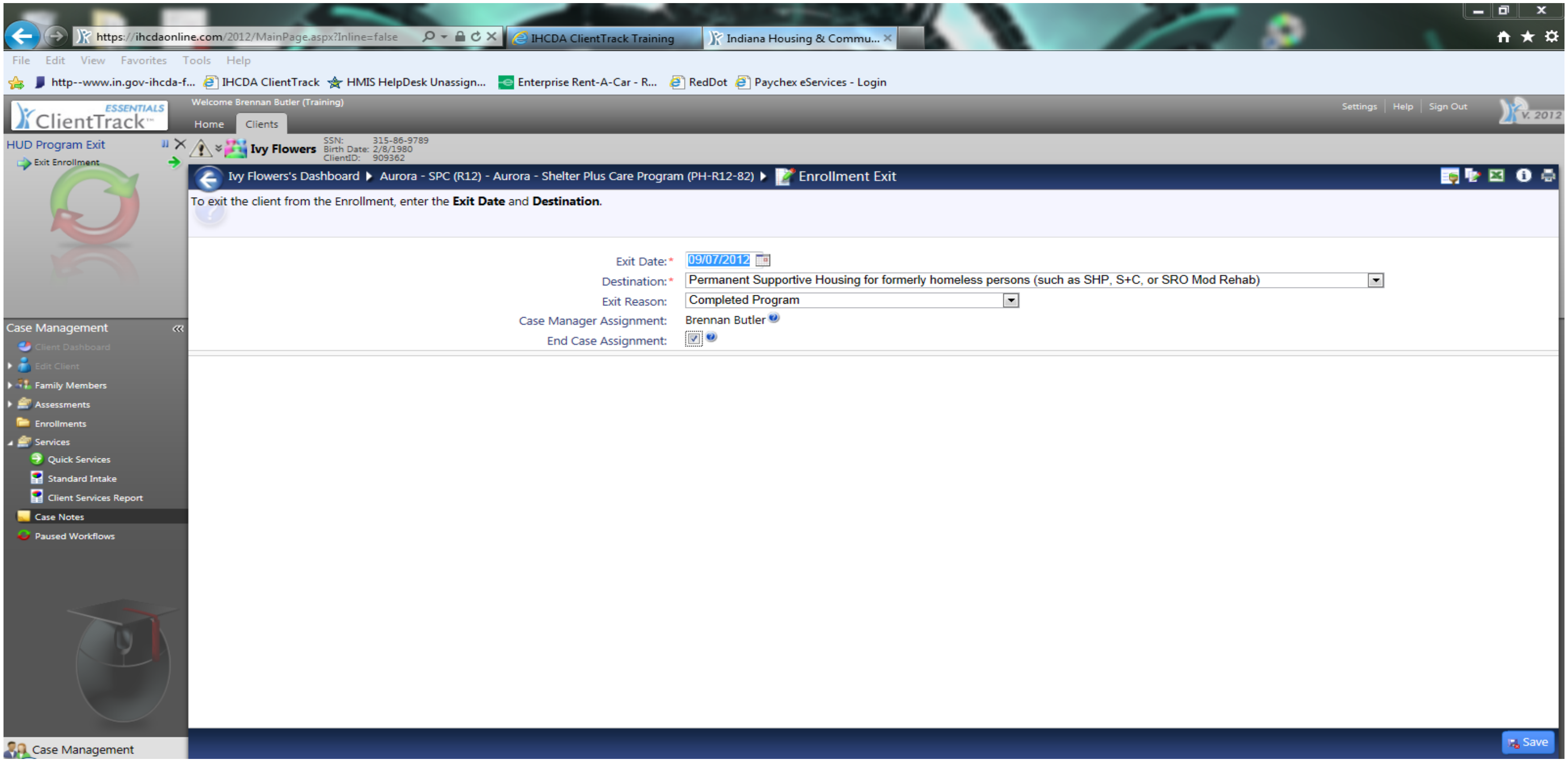
To “**Exit**” a client from the program/enrollment, you can either click on the “**Enrollments**” link on the left hand menu bar, or you can click on the blue bar that says “**Client Name Enrollments**”. This will take you to the “**Enrollments**” screen.



To "Exit" a client click on the "**Blue Play Button**" and then click on the folder icon with the red arrow named "**Exit the Enrollment**". This will launch an Exit Workflow.



Next, you will need to fill in the "**Exit Date**", if you are doing back-data entry you will need to ensure that this has the correct date. Then you will fill in the Destination of the client as well as the Exit Reason. To remove someone from your Case Assignment, click on the check box next to "**End Case Assignment**".



Universal Data Assessment

Fill in the Housing Status for the client.

Literally Homeless – Individual or household who lacks a fixed, regular, and adequate nighttime residence

Unstably Housed – at risk of losing their housing

Imminently losing their housing – individual or household who will imminently lose their primary nighttime residence (within 14 days)

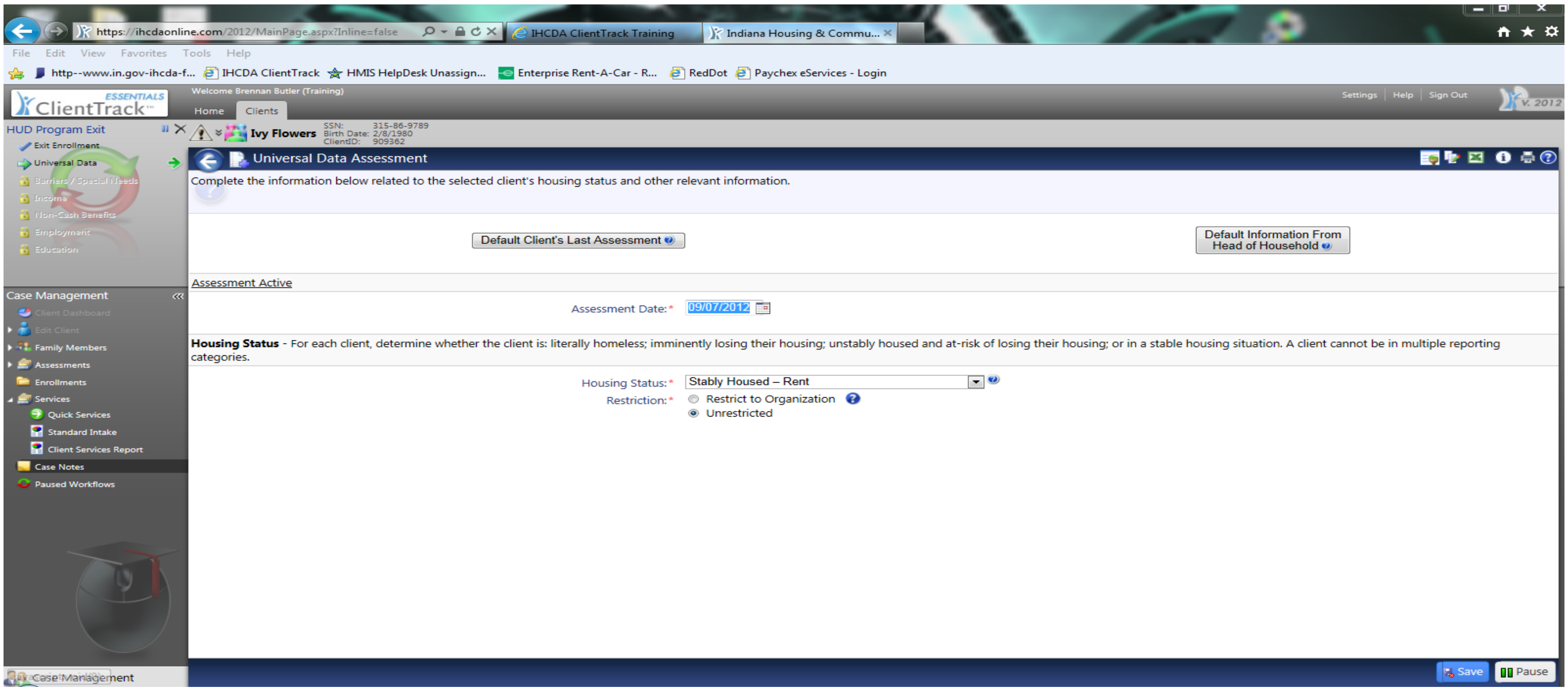
Stably Housed – Rent

Stably Housed – Own

Don't Know – Client has left and you don't know where they have gone

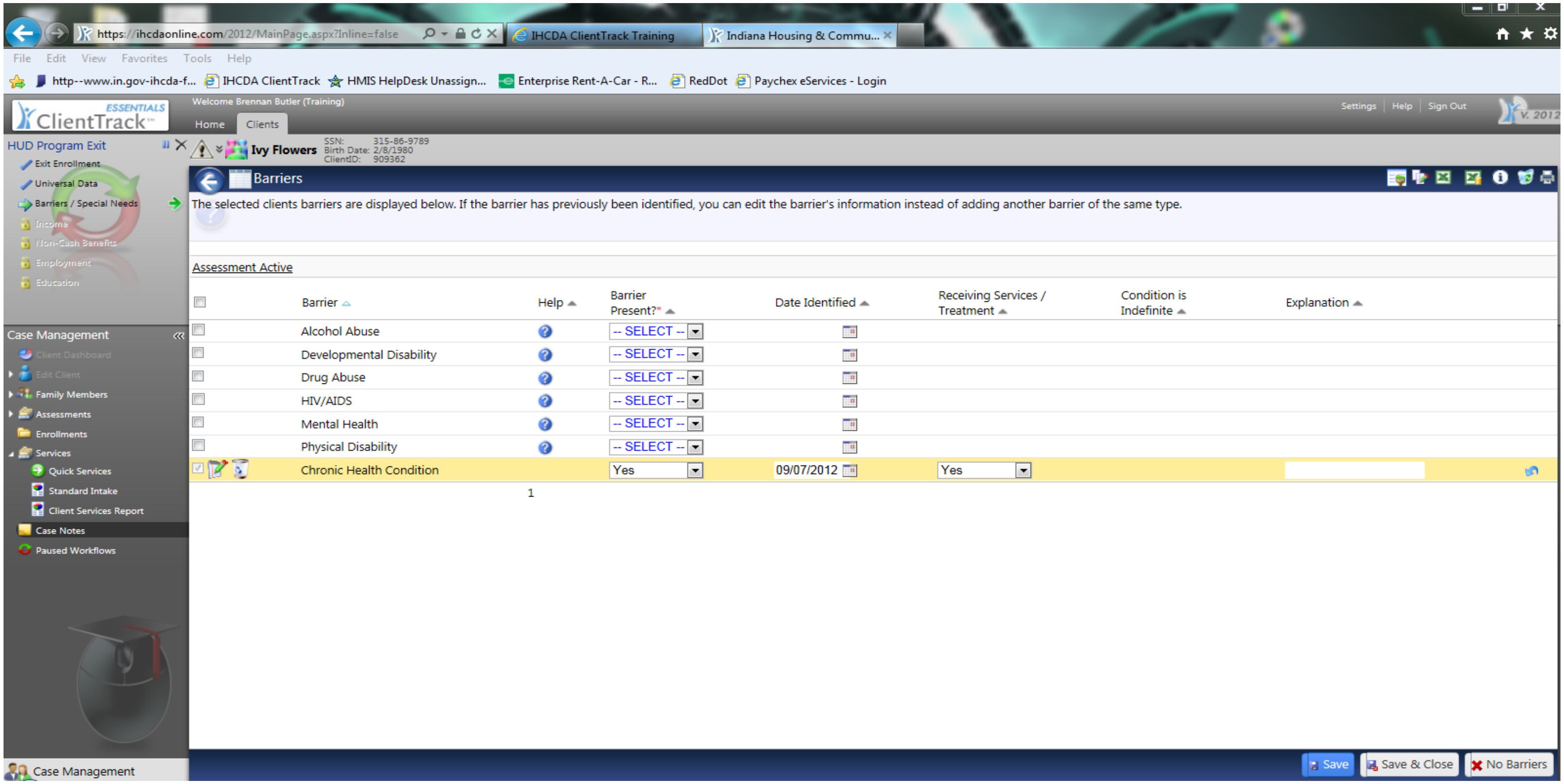
Refused – Client refused to give you any information

Other – Any housing status that is not above.



You will now be required to complete the HMIS Barriers assessment. The built in logic may create additional fields that are required. All fields with a red * are required. If the client has no barriers, click on the No

Barriers button in the lower right hand corner. It is important to keep in mind that clients must have at least one barrier to be eligible for some programs (such as Shelter + Care). Click "**Save & Close**" when completed.



Financial Assessment

An Income Assessment will be completed for EACH household member. Income received by a household member such as child support, TANF, WIC, and food stamps should be designated on the assessment of the household member that directly receives the payment. If an adult receives an SSI or SSDI benefit on behalf of a child, that income should be designated on the income assessment of the child. It is very important that income (cash or non-cash) is properly designated on the proper client assessment.

Earned Income – Employment income

Other Income – Any income not previously listed

Unemployment Insurance – Unemployment benefits from the State

Private Disability Insurance – Non-government funded disability payments

Worker's Compensation – Income for individual who has been injured on the job

Self-Employment – Income earned by an individual who works for themselves

Supplemental Security Income – A federal program that provides additional income for older and disabled people with little to no income stream

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General Assistance – Cash from household or friends, trustee or church/non-profit

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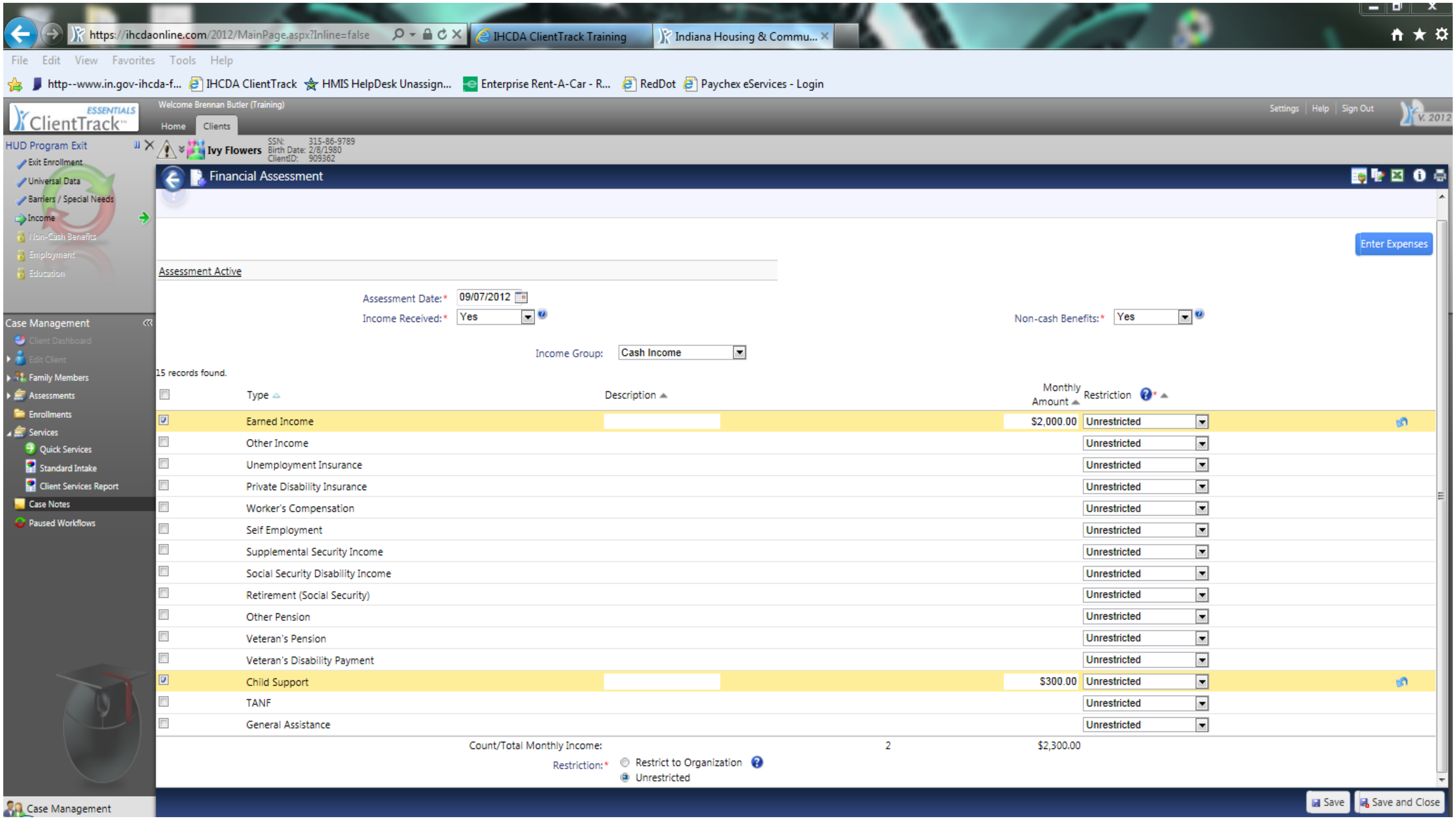

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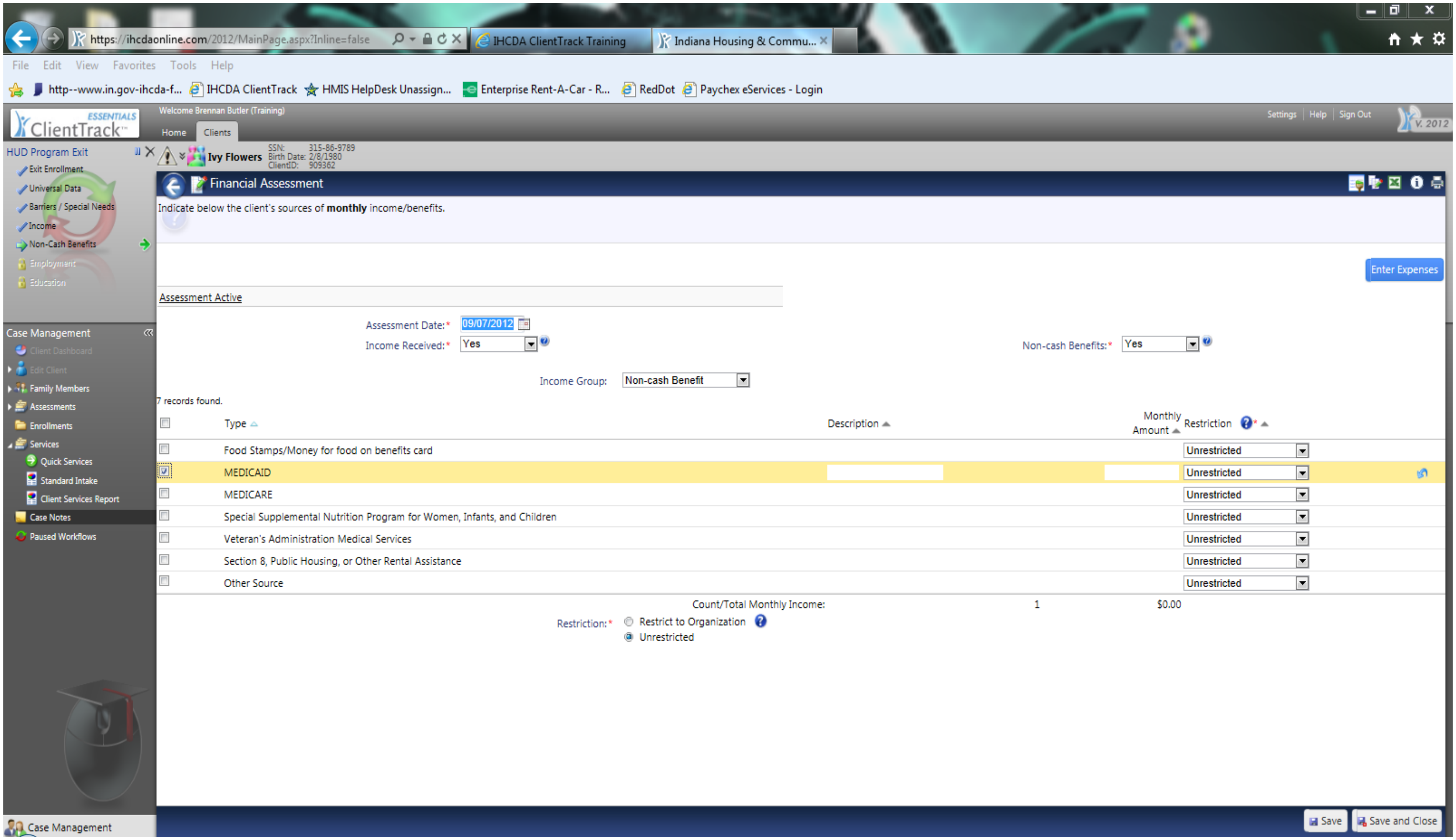
Special Supplemental Nutrition Program for Women, Infants and Children (WIC) – A program geared toward supplying nutritional food for at risk pregnant women and their families

Veteran's Administration Medical Services - Health care benefits and services provided for Veterans

Section 8, Public Housing or Other Rental Assistance – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development

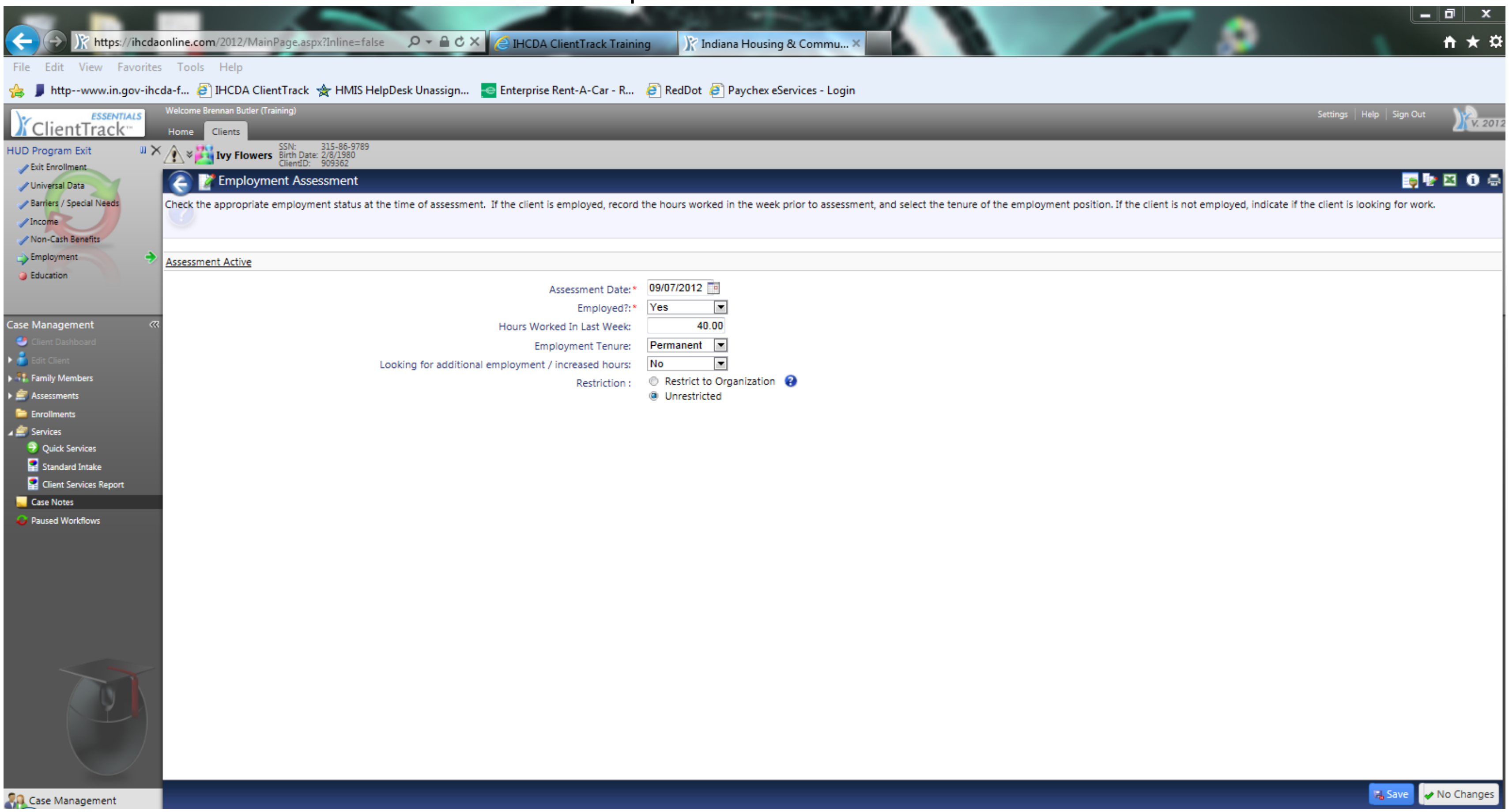
Other Source – Any source not previously listed above.

Click "**Save and Close**" when completed.


https://ihcdaonline.com/2012/MainPage.aspx?Inline=false
IHCDA ClientTrack Training
Indiana Housing & Commu...
File Edit View Favorites Tools Help
http--www.in.gov-ihcda-f... IHCDA ClientTrack HMIS HelpDesk Unassign... Enterprise Rent-A-Car - R... RedDot Paychex eServices - Login
ClientTrack ESSENTIALS
Welcome Brennan Butler (Training)
Home Clients
Settings Help Sign Out
HUD Program Exit
Exit Enrollment
Universal Data
Barriers / Special Needs
Income
Non-Cash Benefits
Employment
Education
Ivy Flowers
SSN: 315-86-9789
Birth Date: 2/8/1980
ClientID: 909362
Financial Assessment
Indicate below the client's sources of monthly income/benefits.
Enter Expenses
Assessment Active
Assessment Date:* 09/07/2012
Income Received:* Yes
Non-cash Benefits:* Yes
Income Group: Non-cash Benefit
7 records found.
Type
Description
Monthly Amount
Restriction
Food Stamps/Money for food on benefits card
MEDICAID
MEDICARE
Special Supplemental Nutrition Program for Women, Infants, and Children
Veteran's Administration Medical Services
Section 8, Public Housing, or Other Rental Assistance
Other Source
Unrestricted
Count/Total Monthly Income: 1 $0.00
Restriction:* Restrict to Organization
Unrestricted
Case Management
Client Dashboard
Edit Client
Family Members
Assessments
Enrollments
Services
Quick Services
Standard Intake
Client Services Report
Case Notes
Paused Workflows
Case Management
Save
Save and Close

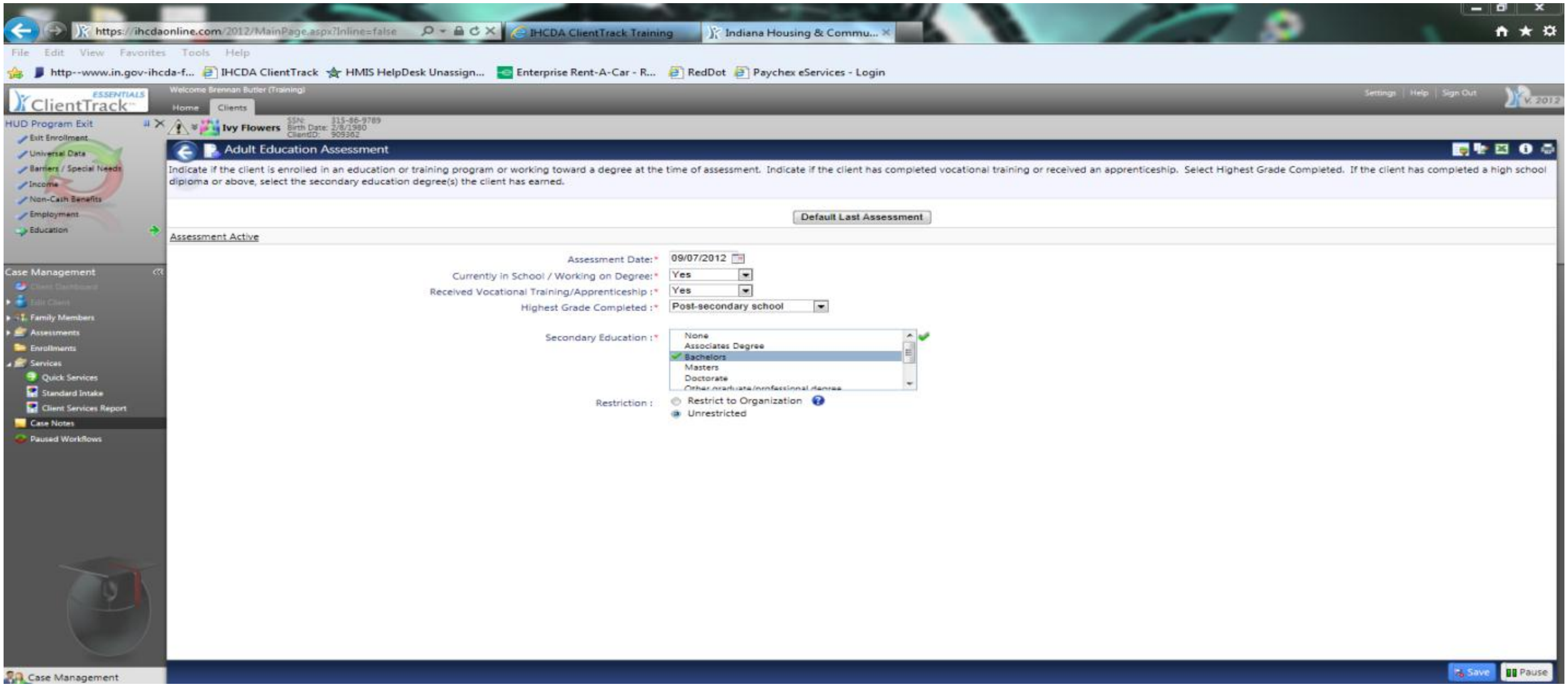
Employment Assessment

When filling out the Employment Assessment, be aware that the built in logic may require you to fill out additional information. Click “**Save**” when completed.

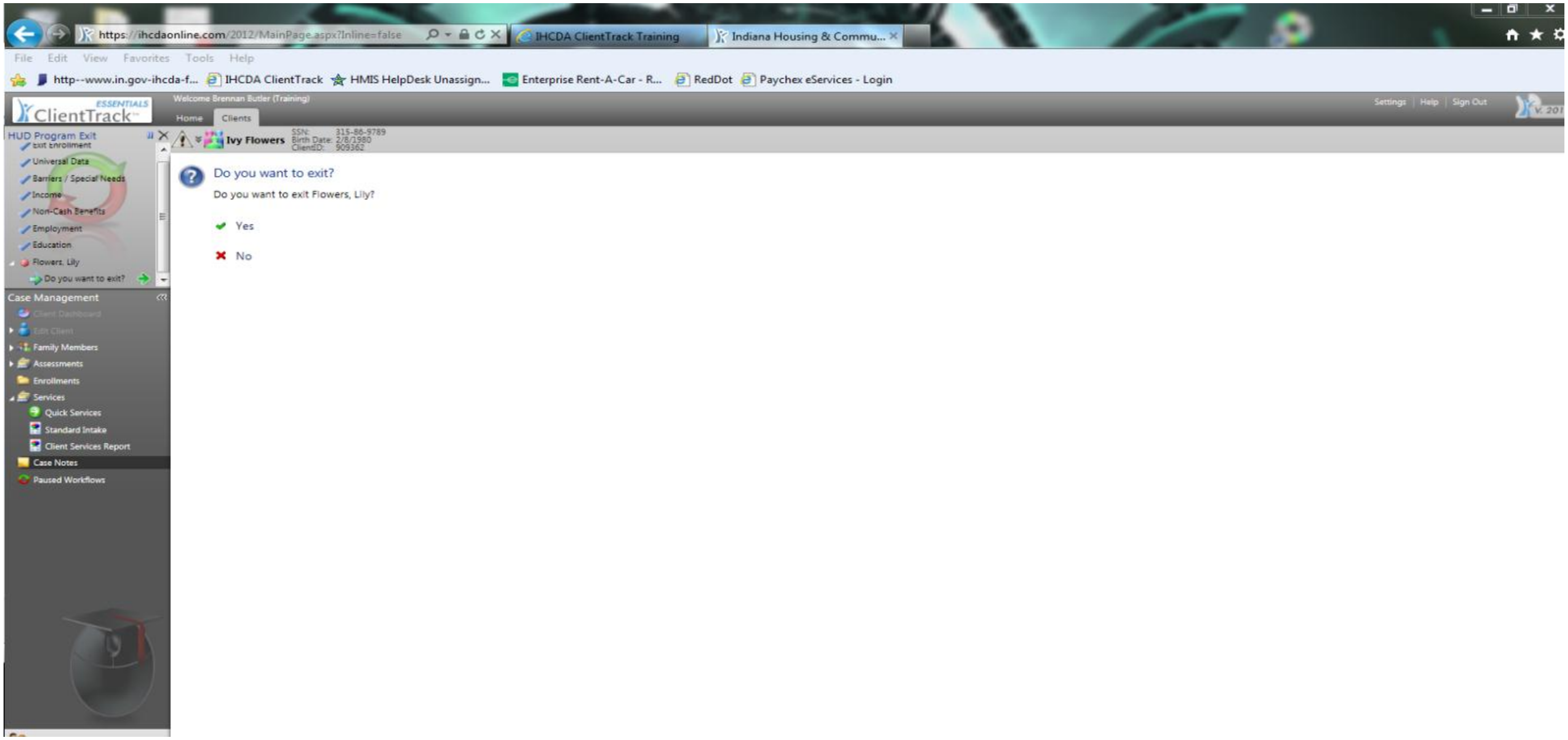


Adult Education Assessment

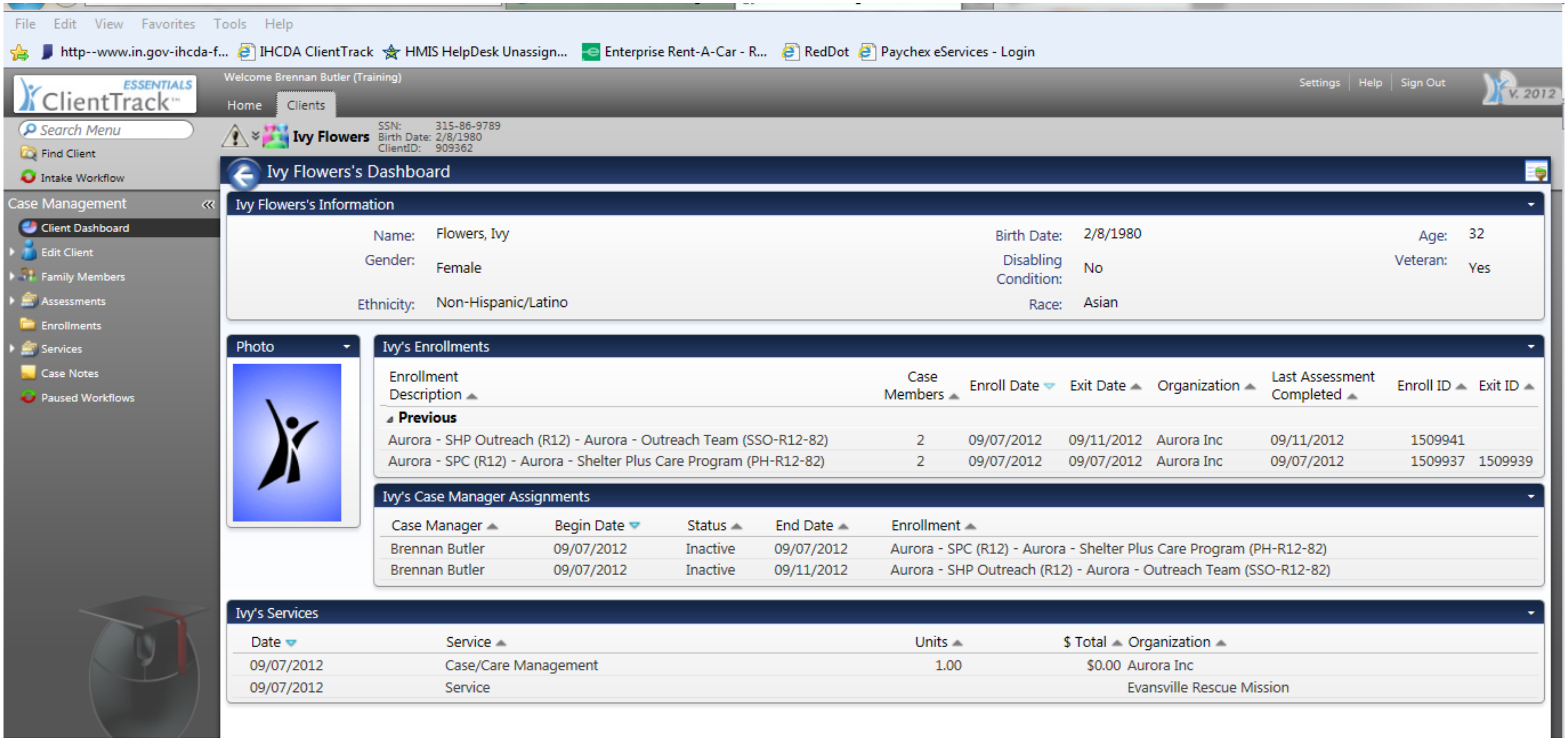
When filling out the Adult Education Assessment, remember that certain answers will prompt the built in logic to require more information. Please note that if a client has had some secondary education, that you have selected “Post-Secondary School” and then select “None” in the Secondary Education box. Click “**Save**” to continue.



Click the “**Yes**” Button to exit the next household member, and so on until all members are exited from the program. You will then be re-directed to the Client Dashboard.


HUD Program Exit
Universal Data
Barriers / Special Needs
Income
Non-Cash Benefits
Employment
Education
Flowers, Lily
Do you want to exit?
Case Management
Family Members
Assessments
Enrollments
Services
Quick Services
Standard Intake
Client Services Report
Case Notes
Paused Workflows
Ivy Flowers
Do you want to exit?
Do you want to exit Flowers, Lily?
Yes
No

Log out of ClientTrack



To log out of ClientTrack, click on the "**Sign Out**" link at the top right hand corner of your screen.

How to Contact the Help Desk

- Email the help desk at HMISHelpDesk@ihcdaonline.com
- Include:
  - Your Name
  - Contact Phone Number
  - Agency Name
  - Program you are working with
  - A description of the issues you are having
  - If possible a screen shot of the error you are receiving
- Allow 1– 2 business days to receive a response.

Notes

- Please remember, the **"Save**" button will save the changes you made to the screen and leave you on the same page. The" **Save & Close**" button will save the changes you have made to the screen and move you to the next one.
- IHCDA will monitor time between user logins and your ClientTrack™ account will be deactivated after 30 days of inactivity.
- Grant and program information must be set up in the system before you can begin to enroll clients. You must give adequate time to IHCDA in order for the set up in ClientTrack™ to be completed.
- While you will have the option on many screens for a "Don't Know or Refused" option – which may be valid at time of intake – it is expected that as information is collected during the program enrollment the client information/assessments will be updated